Liquidlogic

eCAF
Demographics

Customer	eCAF Generic Customer Base
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Document Distribution

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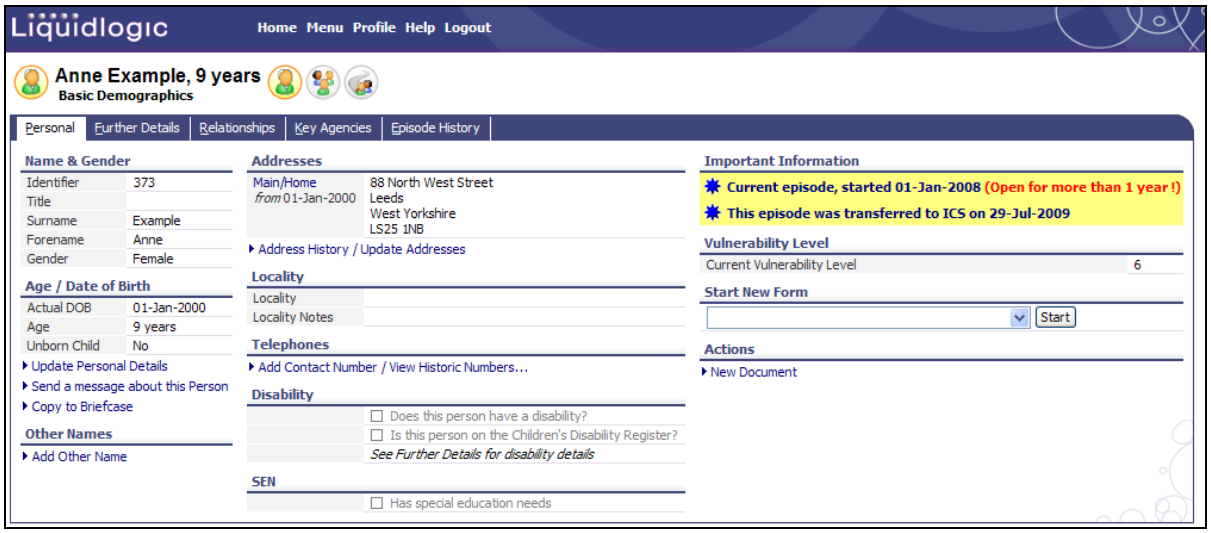
Demographic Icons

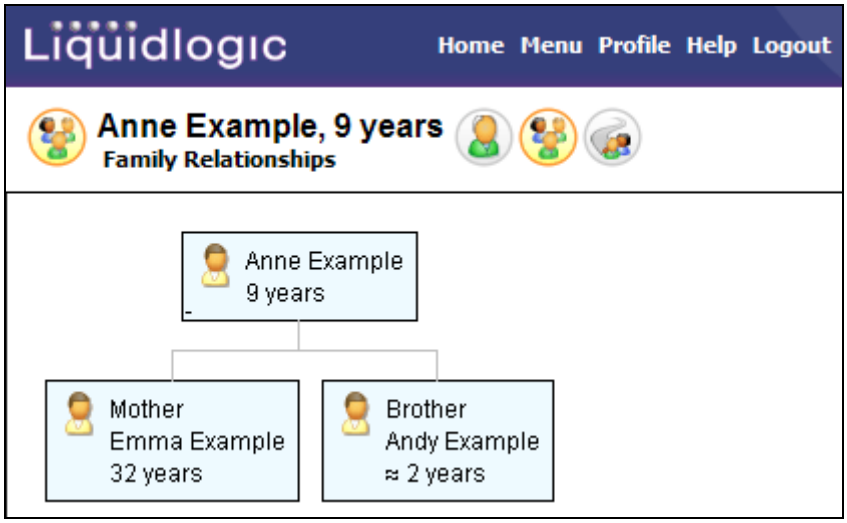
When you have opened a child's record there are three icons across the top of the screen. These icons help the user navigate through the system.



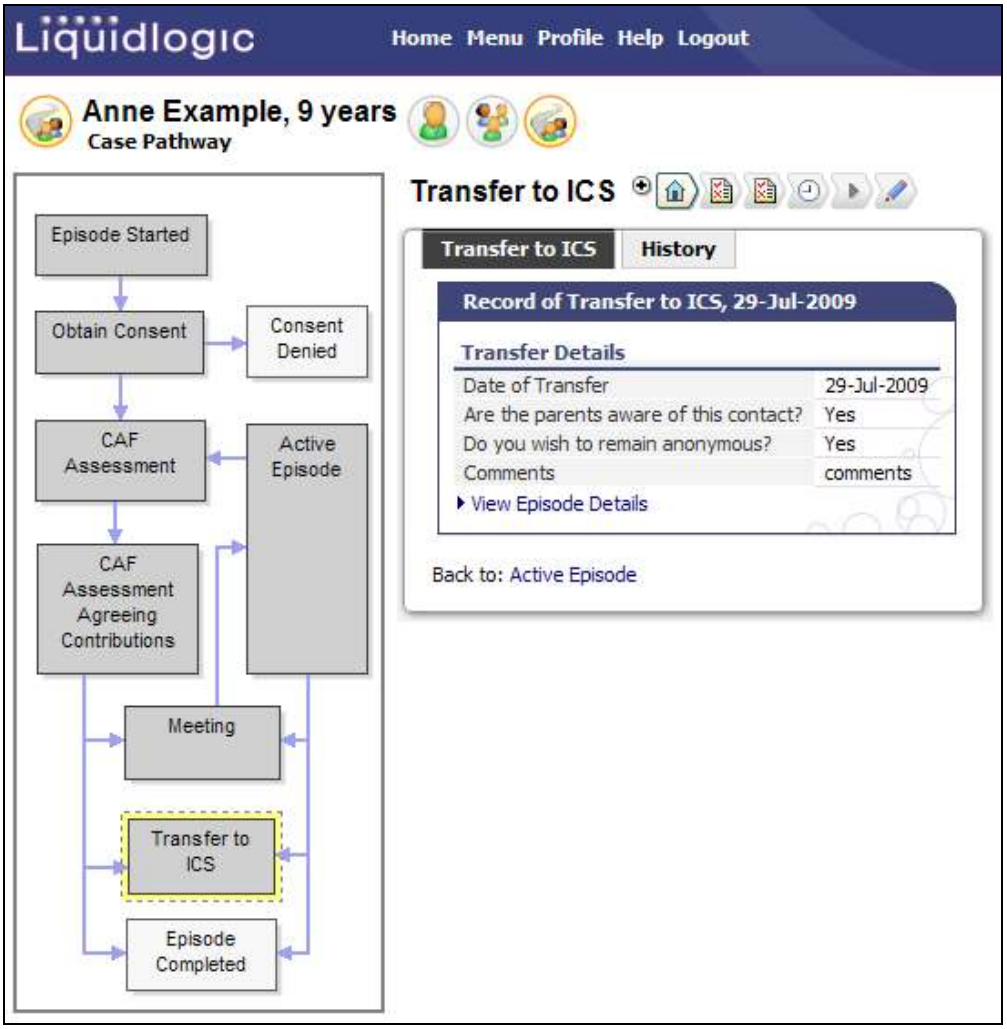
TIP: For customers who connect to ContactPoint from their Protocol eCAF system, an additional icon for connecting to and searching ContactPoint may be displayed:

Child's Demographics – click on this icon to be taken to the child/young person's main demographic tabs. (See above) You will notice that whenever the demographic icon is selected you will be taken back to the last tab that was viewed for this child. Click on the **Personal** tab to view the personal details.

Family Tree – click on this icon to view the family tree. This will display all family members that have been set up on the **Relationships** tab.



Case Pathways – click this link to view the latest case pathway and episode details for the child. Case Pathways are covered in more detail within the eCAF Episode document.



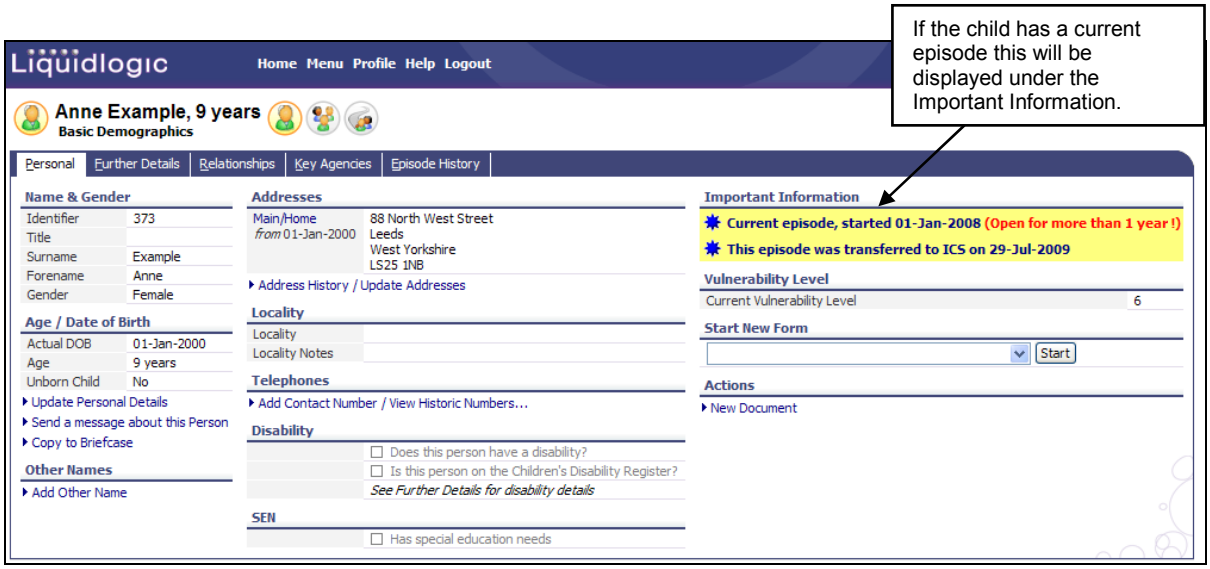
Child's Demographics

Once you have searched for and selected a child's record, a set of tabs will be displayed that hold information on that person. These are referred to as the child's **Basic Demographics**. Please refer to the **eCAF General** User Manual for further details on searching.

Depending upon your profile you will be able to view/update certain information on each of the tabs.

This document explains how to view/update and create details to enhance the child's demographics. The demographic details will also help form other information that is held elsewhere in the system; for example a referral and information record is primarily made up from a child's demographic information. This reduces the duplication of data entry throughout the system.

Whenever you are within a child's record, you can retrieve their demographics at any time by clicking on the demographic icon at the top of the page:



Personal Tab

The **Personal** tab holds information relating to the personal details and address(es) of the selected record. This tab also includes a section for any important information; this will be highlighted not only for the child but any related persons or people with the same address.

All of the information held under the heading **Important Information** can be clicked on to view further details. If the important information is directly linked to the child you will be taken to the relevant part of the child's record or if the important information is about a related person or someone at the same address you will be taken to the other person's record.

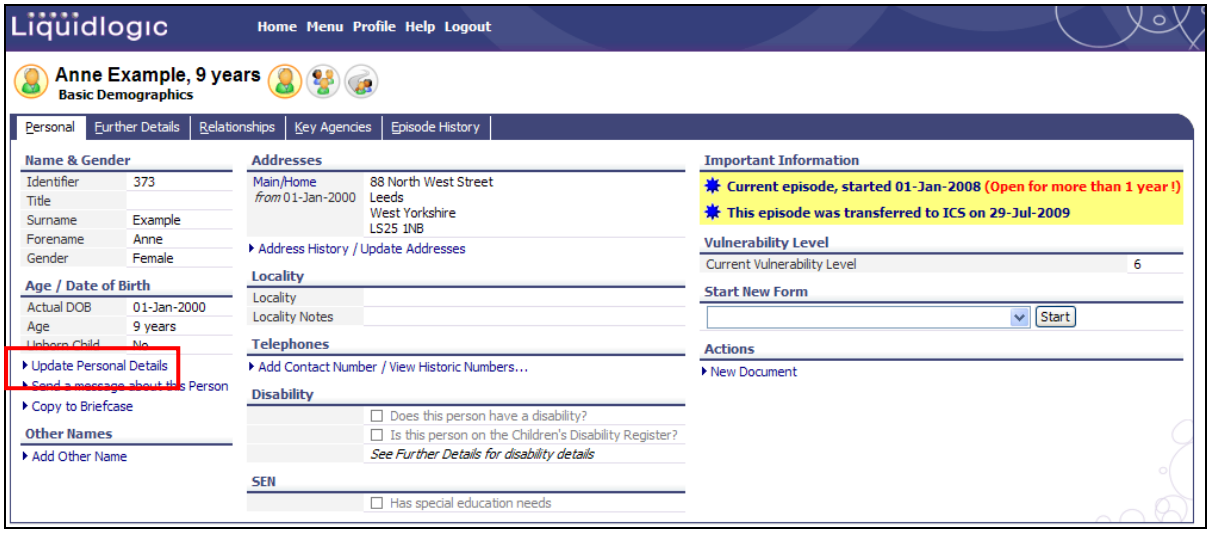
The **Personal** tab also provides a link to create a **New eCAF Episode** if one does not already exist. If the child has a current eCAF episode, the option to create a new ECAF episode will be unavailable.

For more information on creating a new eCAF episode please refer to the **ECAF Episode** user manual.

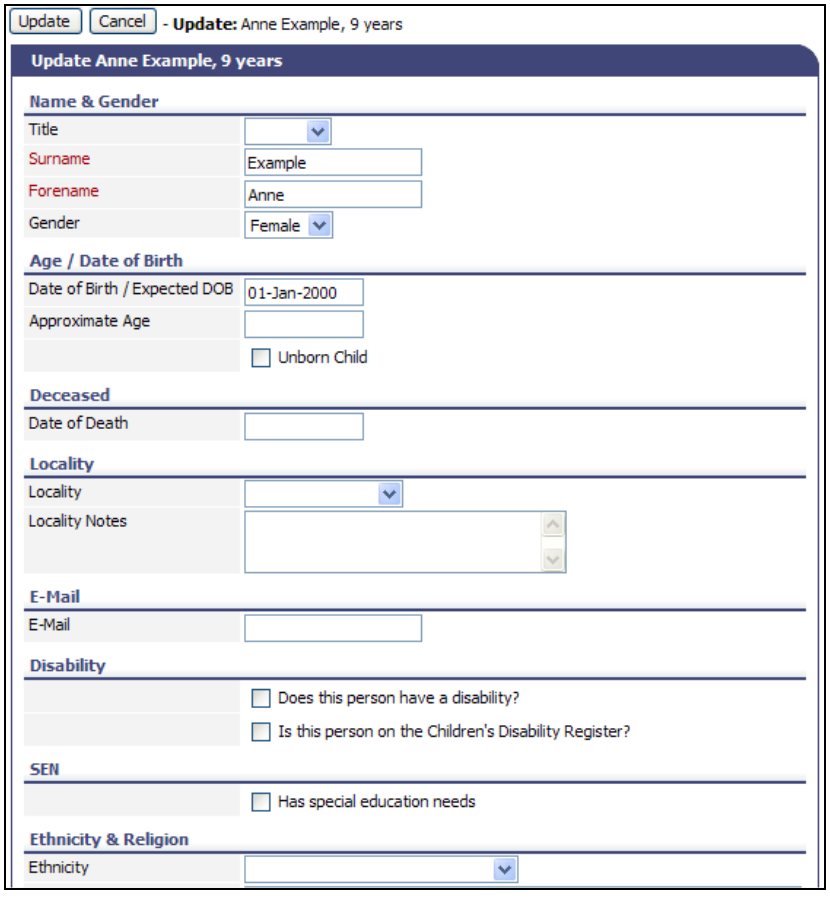
Updating Personal Details

Details on the **Personal** tab can be updated at any time. The 'Update Personal Details' option also enables information on both the **Personal** and **Further Details** tabs to be modified. This includes Name and Date of Birth/Death, Locality, SEN, Ethnicity, Immigration, Nationality, Religion and whether an interpreter is required.

1. Click **Update Personal Details**

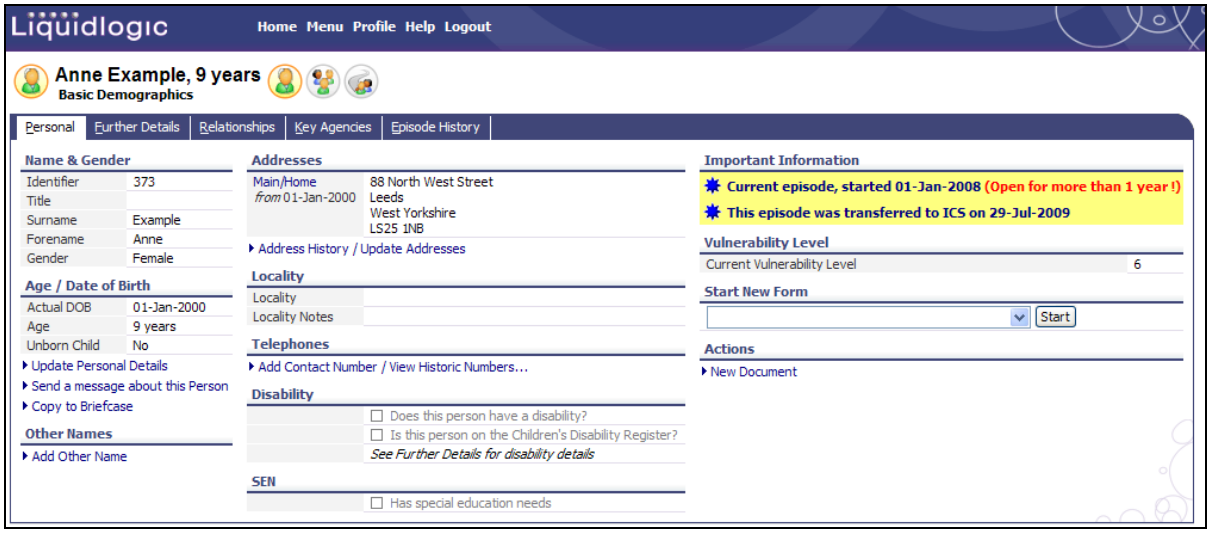


2. Enter the additional/updated information and then click on the **Update** button

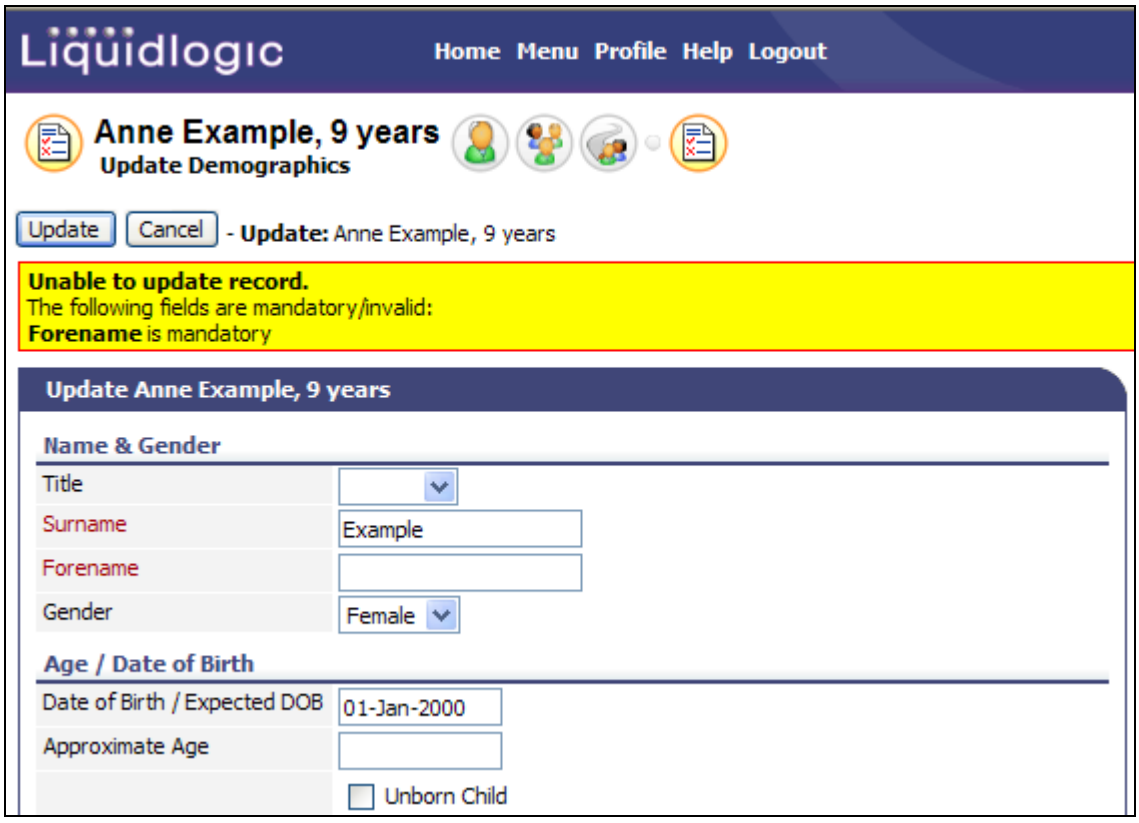


TIP: Any fields shown in **red**, indicate that the field is mandatory and must contain data

Once updated, all tabs within the child's demographics will be displayed again.



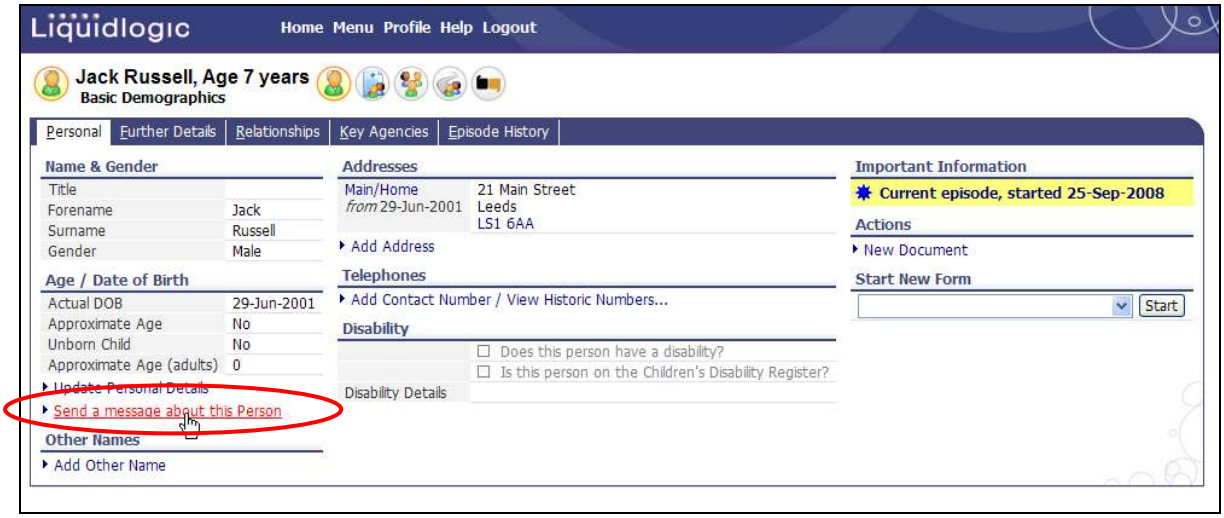
NOTE: The system will prompt the user if any information has been entered incorrectly or if a mandatory field is not completed as the record cannot be updated. Any invalid or missing information will be highlighted in a yellow box at the top of the screen.



Sending Messages

The system allows messages about a person, with an eCAF record, to be sent to other professionals with access to Protocol eCAF.

1. To send a message about a person navigate to the **Personal** tab on the demographics record
2. Click **Send a message about this Person**



3. Select the **Click here to select a user…**link to choose the recipient. The **My Contacts** section of the **Address Book** will be displayed

NOTE: For further guidance on using the Address Book please refer to the **eCAF General** User Manual

4. Select an active professional or department from the Address Book. The recipient will then be recorded on the message

To remove a recipient on a message click on the ✖ against the recipient's name

5. To add multiple recipients for a message repeat **steps 3 and 4** (above)
6. Select the appropriate **Message Options**

Message Options Explained:

Disable Forward Option	If selected, removes the ability for recipients to forward the message they have received
Only allow recipients to view Message Body (in Thread View)	If selected, removes the ability for recipients to view the Message Body in the Incoming Message View. Message Body will only be viewable in the Thread View

7. Enter a **Subject** and **Message**

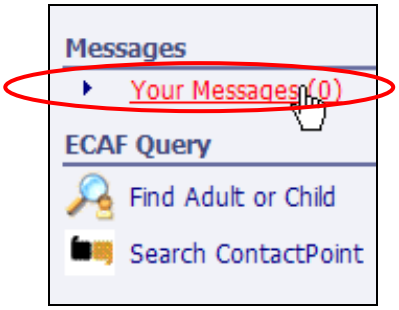
Liquidlogic
Home Menu Profile Help Logout
Send
Cancel
Message about James Taylor , 8 years
The Message
Recipients
Social Worker 1 - Liquid Test Team
Add User
Click here to select another user...
Attached Record
James Taylor , 8 years
Message Options
Disable Forward Option
Only allow recipients to view Message Body (in Thread View)
Subject
Behavioral Issues identified following assessment
Message
Hi Social Worker 1,
After carrying out an assessment on James, a number of behavioural issues have been identified which I would like to discuss with you further. I remember you had a similar case a few weeks ago and was interested in the approach you took.....
Thanks
Claire

8. Click **Send**

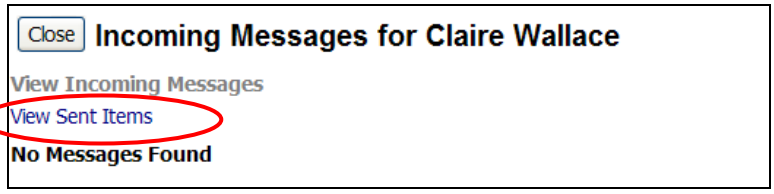
The message will be sent to all recipients listed.

Viewing Sent Items

1. Click the **Your Messages** link on the Protocol eCAF Homepage

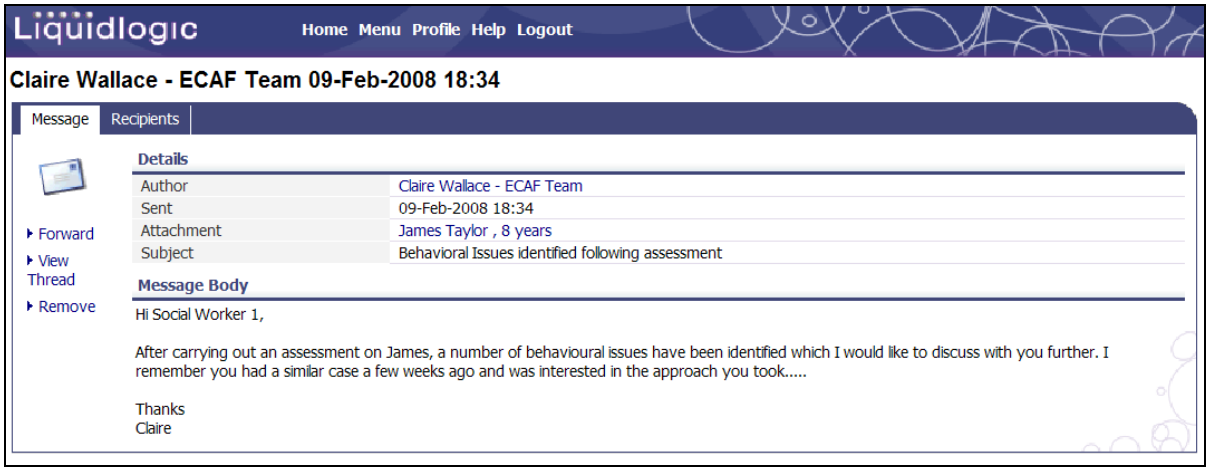


2. Click **View Sent Items**



3. All messages sent by you will be displayed, Click on the specific message you want to view

The full message will open and a number of actions can be performed


Liquidlogic
Home Menu Profile Help Logout
Claire Wallace - ECAF Team 09-Feb-2008 18:34
Message
Recipients
Details
Author
Claire Wallace - ECAF Team
Sent
09-Feb-2008 18:34
Attachment
James Taylor , 8 years
Subject
Behavioral Issues identified following assessment
Forward
View Thread
Remove
Message Body
Hi Social Worker 1,
After carrying out an assessment on James, a number of behavioural issues have been identified which I would like to discuss with you further. I remember you had a similar case a few weeks ago and was interested in the approach you took.....
Thanks
Claire

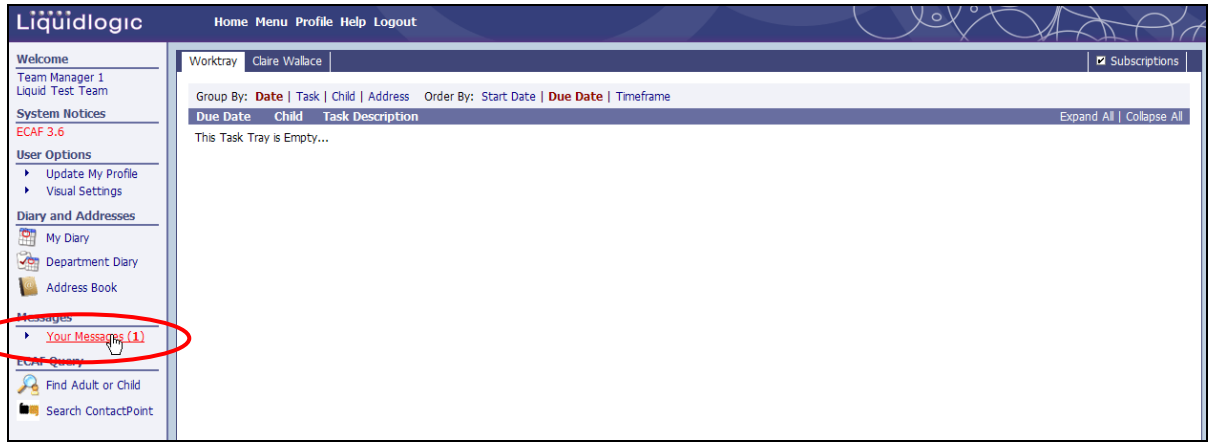
Action	Description
Forward	To forward the selected message to further recipients
View Thread	To view the complete message thread/trail relating to the selected message
Remove	To permanently remove the selected message from your sent items

4. Select the **Recipients** tab to view the recipients this message was original sent to
5. To close the message and return to your Homepage, Click the **Home** link

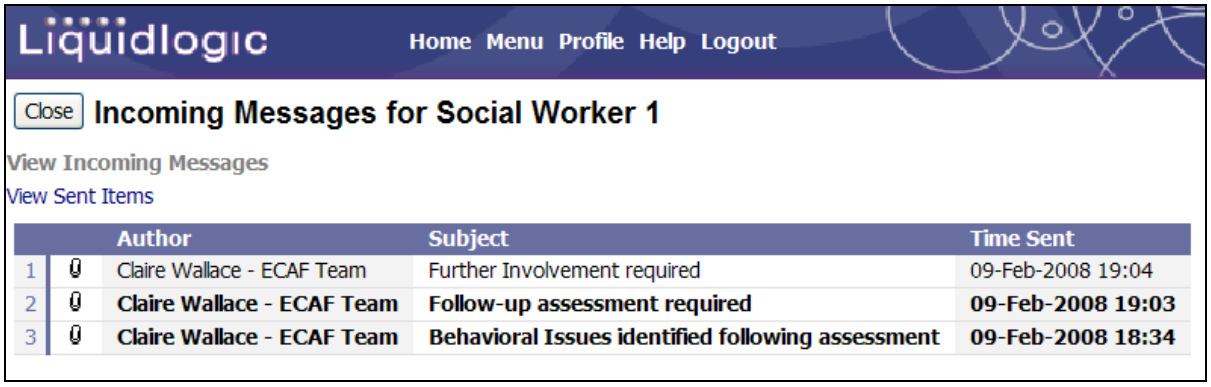
Receiving Messages

If an active user of Protocol eCAF has been sent a message generated by another active user of Protocol eCAF then the following steps illustrate how to access received messages.

1. Click the **Your Messages** link on the Protocol eCAF Homepage. The number of new messages received will also be specified in **RED**

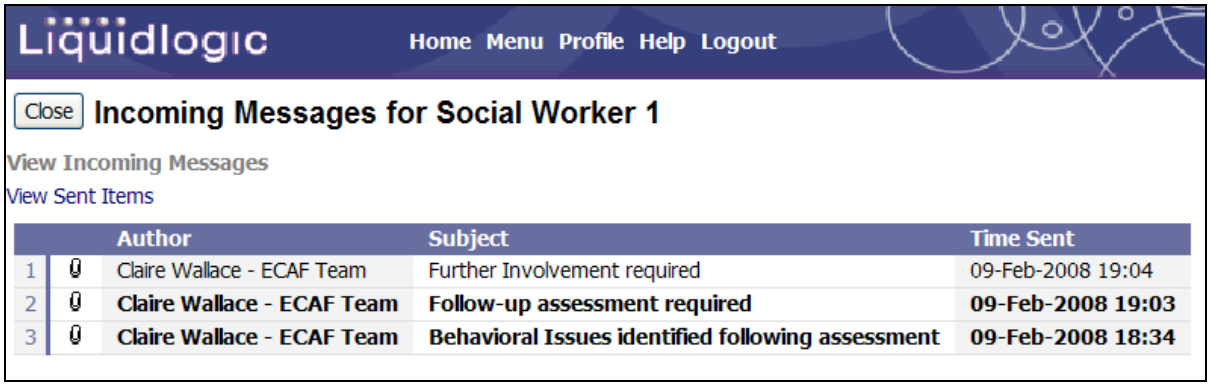


All messages received will be listed. Those messages in **Bold** text indicate unread messages, those messages not bold indicate the messages which have been viewed/read.

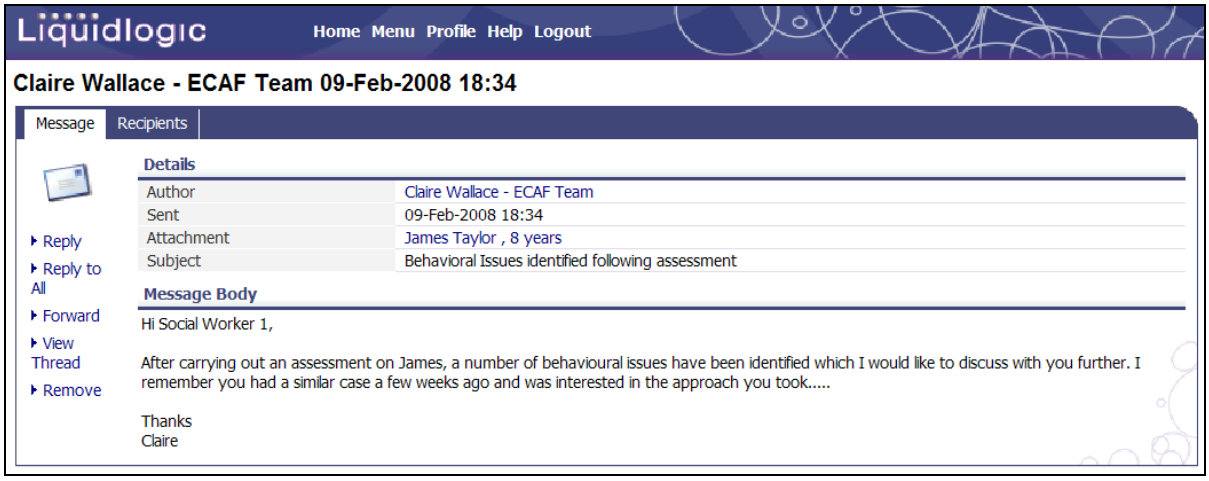

Liquidlogic
Home Menu Profile Help Logout
Close
Incoming Messages for Social Worker 1
View Incoming Messages
View Sent Items
Author
Subject
Time Sent
1 Claire Wallace - ECAF Team Further Involvement required 09-Feb-2008 19:04
2 Claire Wallace - ECAF Team Follow-up assessment required 09-Feb-2008 19:03
3 Claire Wallace - ECAF Team Behavioral Issues identified following assessment 09-Feb-2008 18:34

Viewing Incoming Messages

1. Follow the steps in the **Receiving Messages** section of this user manual
2. Click on the message to be read/viewed from the incoming messages listed


Liquidlogic
Home Menu Profile Help Logout
Close
Incoming Messages for Social Worker 1
View Incoming Messages
View Sent Items
Author
Subject
Time Sent
1 Claire Wallace - ECAF Team Further Involvement required 09-Feb-2008 19:04
2 Claire Wallace - ECAF Team Follow-up assessment required 09-Feb-2008 19:03
3 Claire Wallace - ECAF Team Behavioral Issues identified following assessment 09-Feb-2008 18:34

The full message will open and a number of actions can be performed:


Liquidlogic
Home Menu Profile Help Logout
Claire Wallace - ECAF Team 09-Feb-2008 18:34
Message
Recipients
Reply
Reply to All
Forward
View Thread
Remove
Details
Author
Claire Wallace - ECAF Team
Sent
09-Feb-2008 18:34
Attachment
James Taylor , 8 years
Subject
Behavioral Issues identified following assessment
Message Body
Hi Social Worker 1,
After carrying out an assessment on James, a number of behavioural issues have been identified which I would like to discuss with you further. I remember you had a similar case a few weeks ago and was interested in the approach you took.....
Thanks
Claire

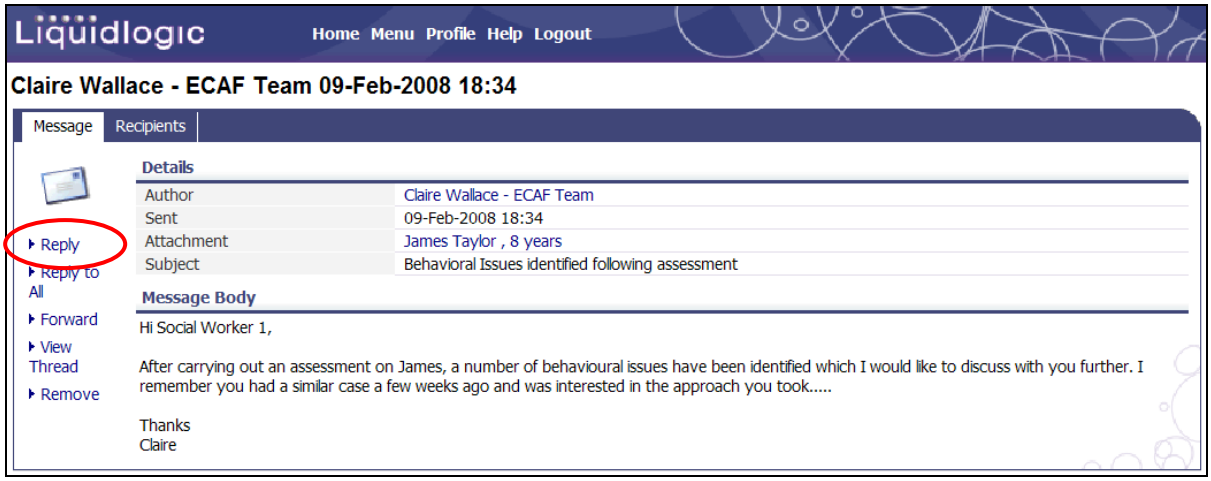
Action	Description
Reply	To reply to author of the message
Reply to All	To reply to the author and all other recipients of the specific message
Forward	To forward the selected message to further recipients
View Thread	To view the complete message thread/trail relating to the selected message
Remove	To permanently remove the selected message from your Incoming Messages View

3. After viewing/reading the message, to return to the Homepage, Click the **Home** link. Alternatively perform the necessary action regarding the message, refer to the next section for **Message Actions**.

Message Actions

Reply

1. To reply to a message, Click **Reply**


Liquidlogic
Home Menu Profile Help Logout
Claire Wallace - ECAF Team 09-Feb-2008 18:34
Message
Recipients
Reply
Reply to All
Forward
View Thread
Remove
Details
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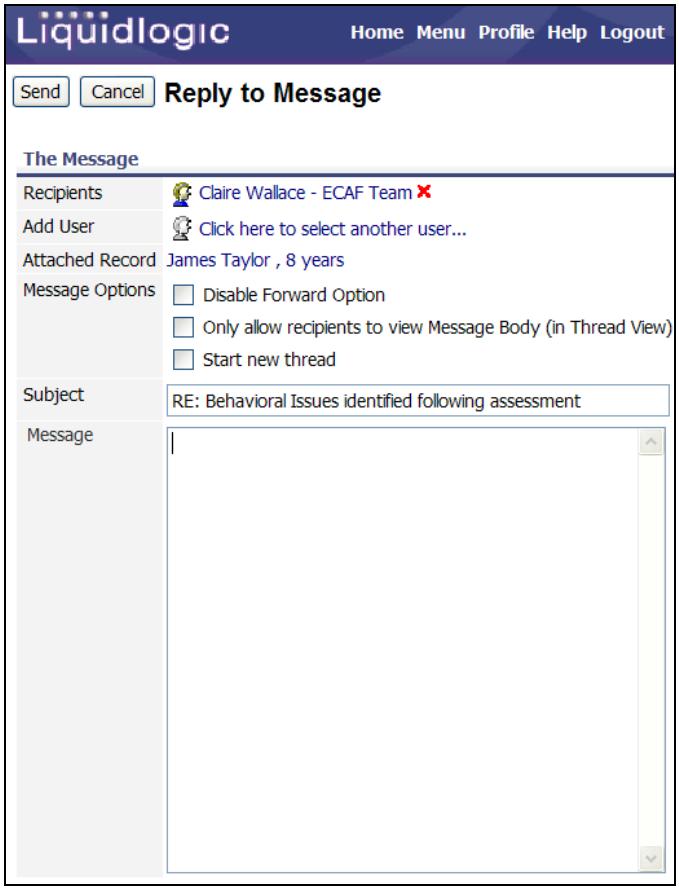
Hi Social Worker 1,
After carrying out an assessment on James, a number of behavioural issues have been identified which I would like to discuss with you further. I remember you had a similar case a few weeks ago and was interested in the approach you took.....
Thanks
Claire

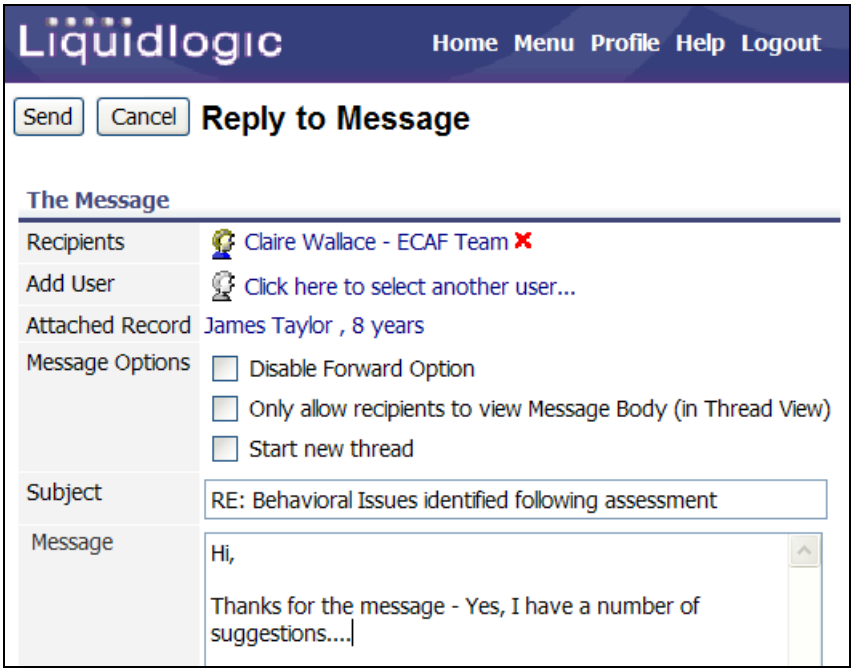
The reply message will appear on screen, with the recipient defaulted to the original author of the message.



2. Add a **further recipient** (if required), select the appropriate **Message Options**

The **Start new thread** option enables the sender to start a new message trail rather than continuing the current thread

3. Enter **Message** details and then click **Send**



Reply to All

If a message has been sent to you and a number of other recipients you have the option to reply to the author of the message and all other recipients.

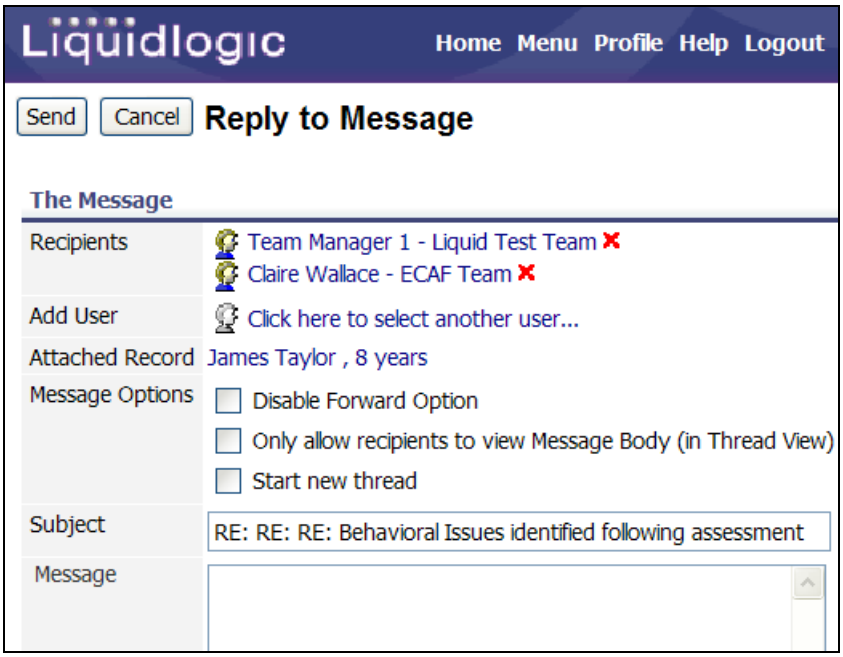
1. Click the **Reply to All** link on the message

The reply message will appear on screen, with all recipients appearing by default.

2. Add a **further recipient** (if required), select the appropriate **Message Options**

The **Start new thread** option enables the sender to start a new message trail rather than continuing the current thread

3. Enter **Message** details
4. Click **Send**



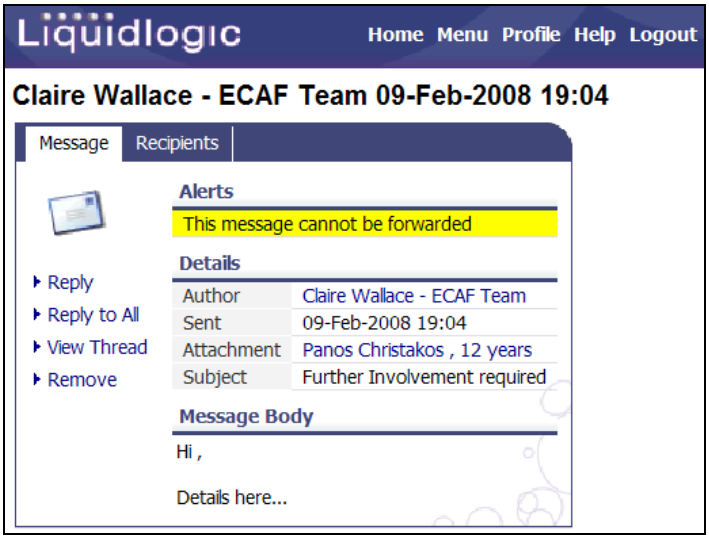
Forward

1. Click the **Forward** link on the message

The original message is displayed in the message body, additional text can be added to the message for the recipient to read.

2. Select the **Click here to select a user…** link to choose the recipient from your My Contacts
3. Click **Send**

TIP: The author/sender of a message can select the **Disable Forward Option**, this would mean the recipient would not have the ability to carry out the above steps and forward the message on to others. The recipient would be notified the **message can not be forwarded** (below).

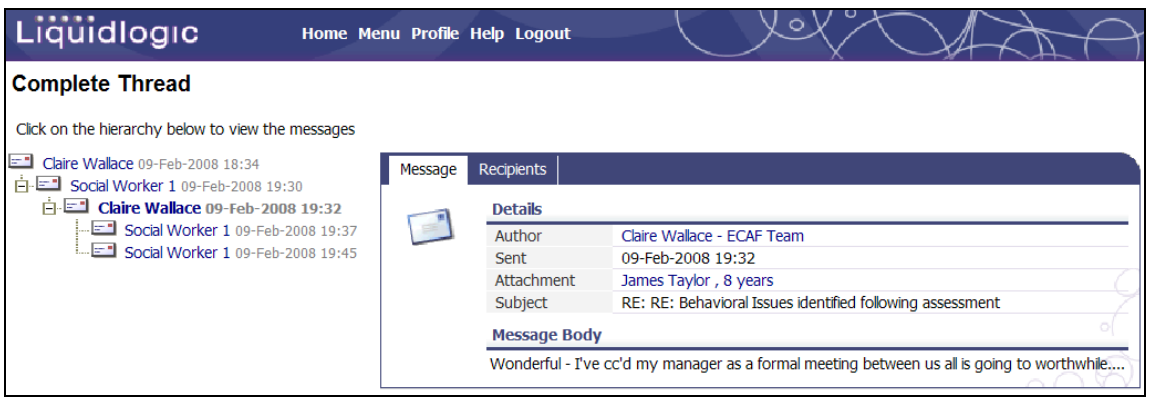


View Thread

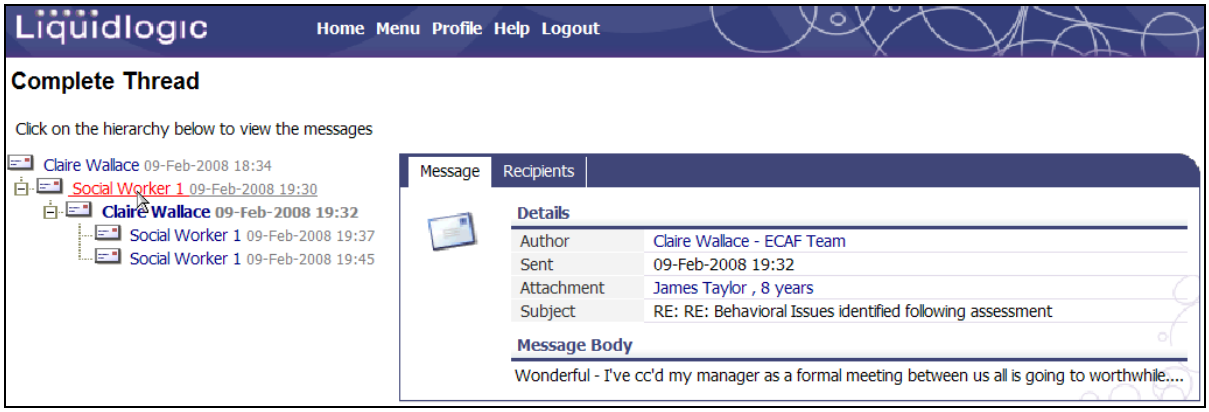
To view a history of the responses to a message between people a message thread can be viewed

1. Click the **View Thread** link on the message

2. A hierarchy of the responses in relation to the message appears



3. To view the specific messages included within the chosen message thread, Click on the message in the hierarchy



The message will appear on the right-hand side of the screen

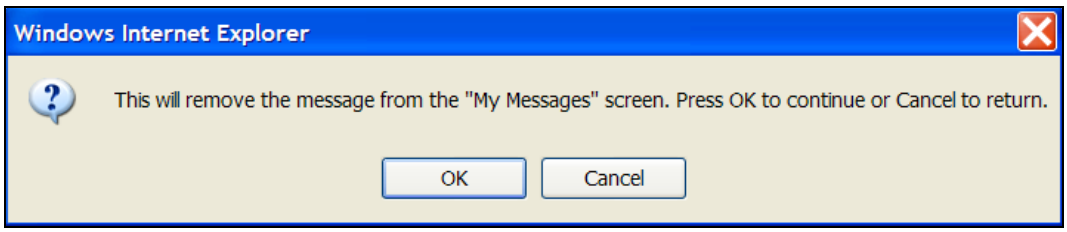
4. To **expand** or **collapse** parts of the message hierarchy, Click on the **+/-** options
5. To exit the message thread and return to the Homepage, Click the **Home** link

Remove

1. Click the **Remove** link on the message

The following warning message will appear. If you choose to remove a message, the message will no longer exist in your 'My Messages'. The message will **NOT** be saved elsewhere on your eCAF account.

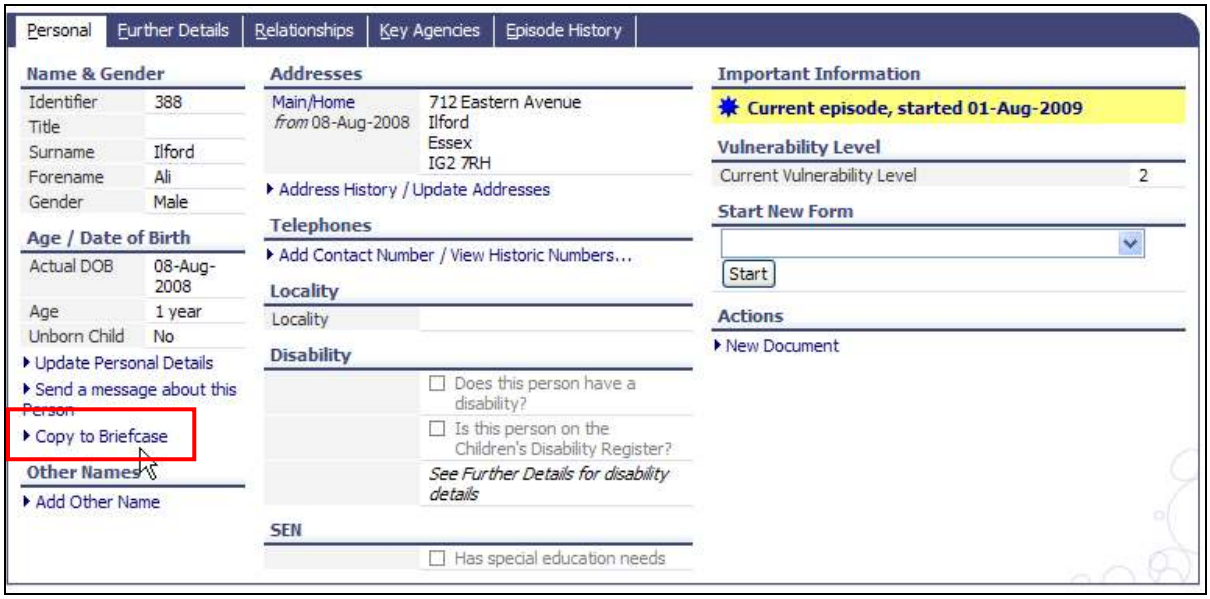
2. Click **OK** to confirm the removal of the message, alternatively Click **Cancel** to keep the message


Windows Internet Explorer
This will remove the message from the "My Messages" screen. Press OK to continue or Cancel to return.
OK
Cancel

Copy to Briefcase

If Briefcase is installed and enabled then a user will have the ability to copy the demographic record to their Briefcase in order to update/view the details remotely.

1. From the Personal tab click **Copy to Briefcase**



NOTE: Please refer to the **Briefcase** manual for further details.

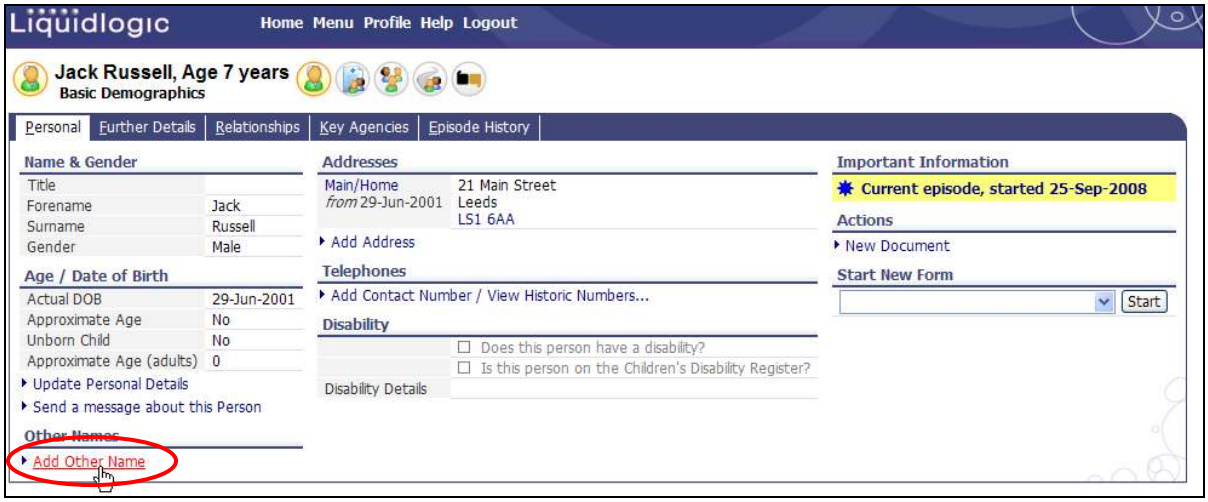
Other Names

The system has the ability to store one or more names for a child. Aliases will also be considered when searching for a child.

The child's demographics must be displayed with the **Personal** tab selected in order to view, update or add other names/alias's to a child's record.

Adding Other Names

1. Click on the link **Add Other Name** from the **Personal** tab



If the child already has one or more aliases recorded, they will be listed under the Other Name History section.

2. Specify the Other Name **Type** from the drop-down selection
3. Choose the **Title** from the drop-down selection
4. Enter the **Forename** and **Surname** in their respective fields

NOTE: Both the forename and surname are mandatory fields and must be entered

5. The Effective **From** date will default to today's date

The **Alias Type, Forename and Surname** fields are all mandatory fields and must be populated in order to create the record.

If you do not enter the correct information the system will prompt you as to which questions have not been answered:

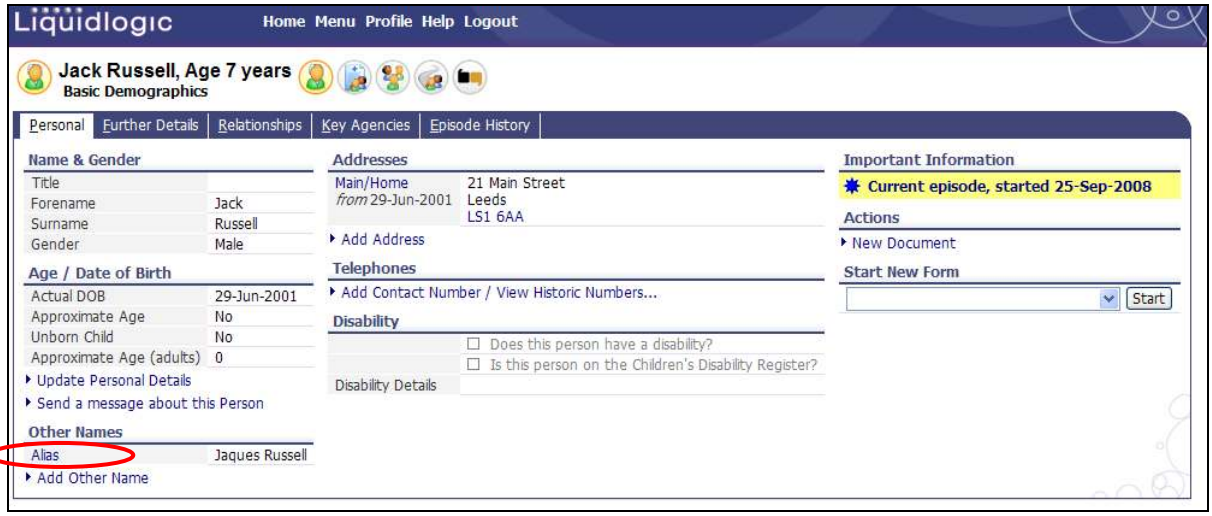
Unable to create record.
The following fields are mandatory/invalid:
Forename is mandatory
Surname is mandatory

6. Click **Create**

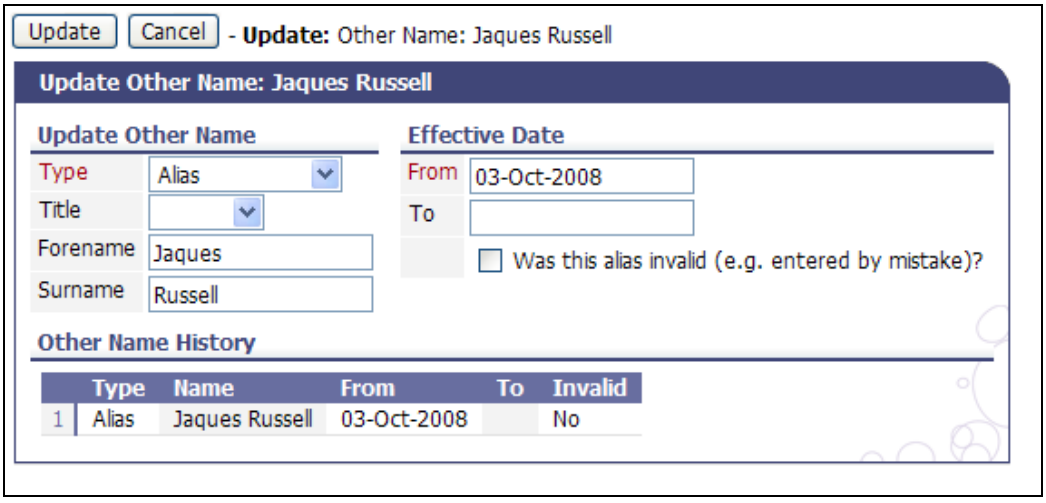
Your alias will now have been added to the child's record.

Updating Other Names

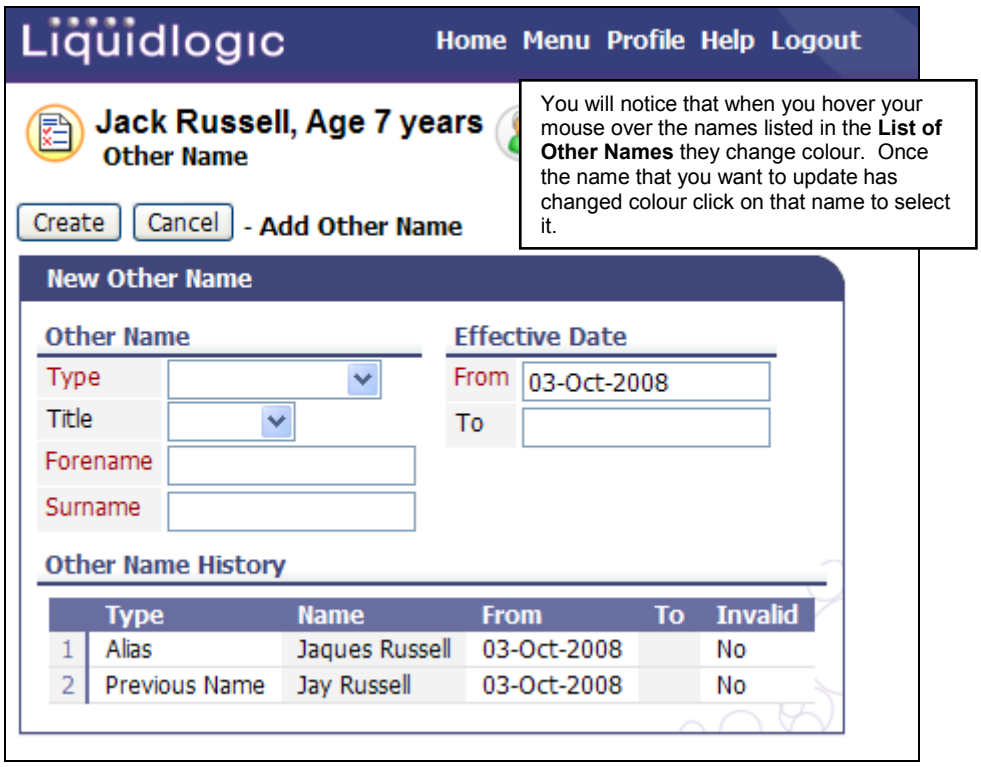
1. Click on the link referencing the Other Name **Type** you need to update from those listed within the Other Names section on the child's **Personal** tab



2. The **Other Name** will appear in an editable screen, see below:

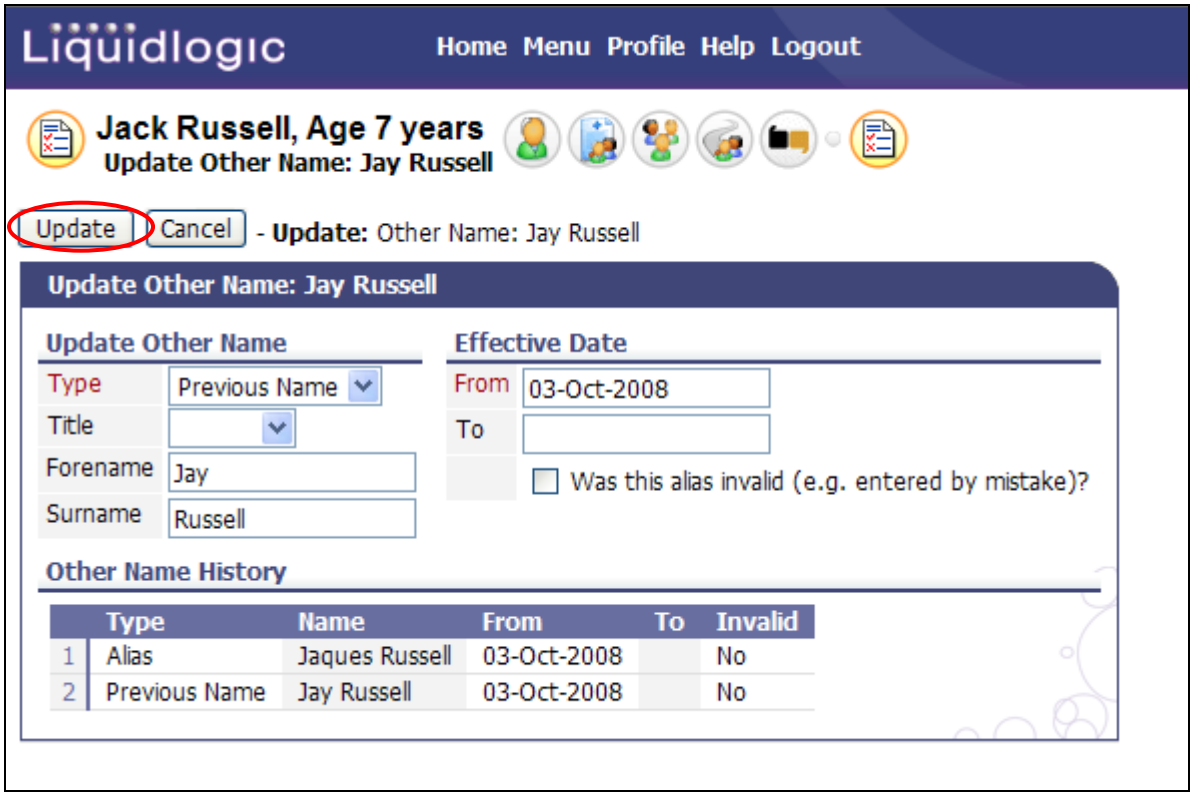


Alternatively, if the child has multiple Other Names recorded then the Click **Add Other Name** link from the personal tab.



Once you have selected the alias that you want to update, the alias details will be displayed:

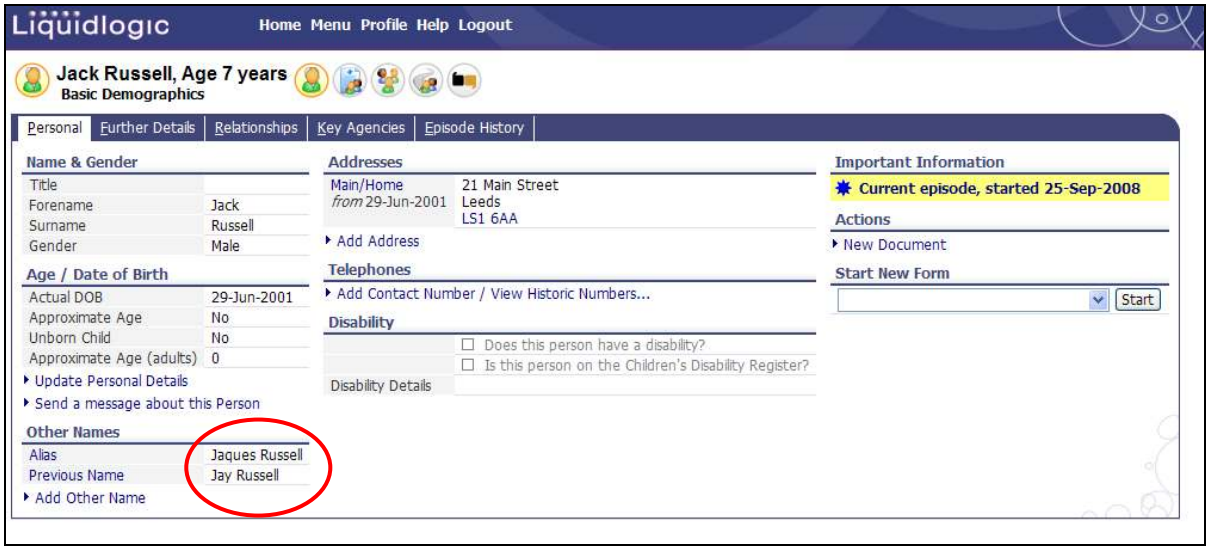
3. Enter the details that need amending and click **Update**



NOTE: Any **Other Name** recorded can be marked as invalid using the **Was this Alias invalid?** check box. The names which are marked as invalid can not be used when searching for the child in ECAF.

This will display the alias details. Click the icon to return to the child's demographics.

All names for the child will also be displayed on the child/young person's **Personal** tab

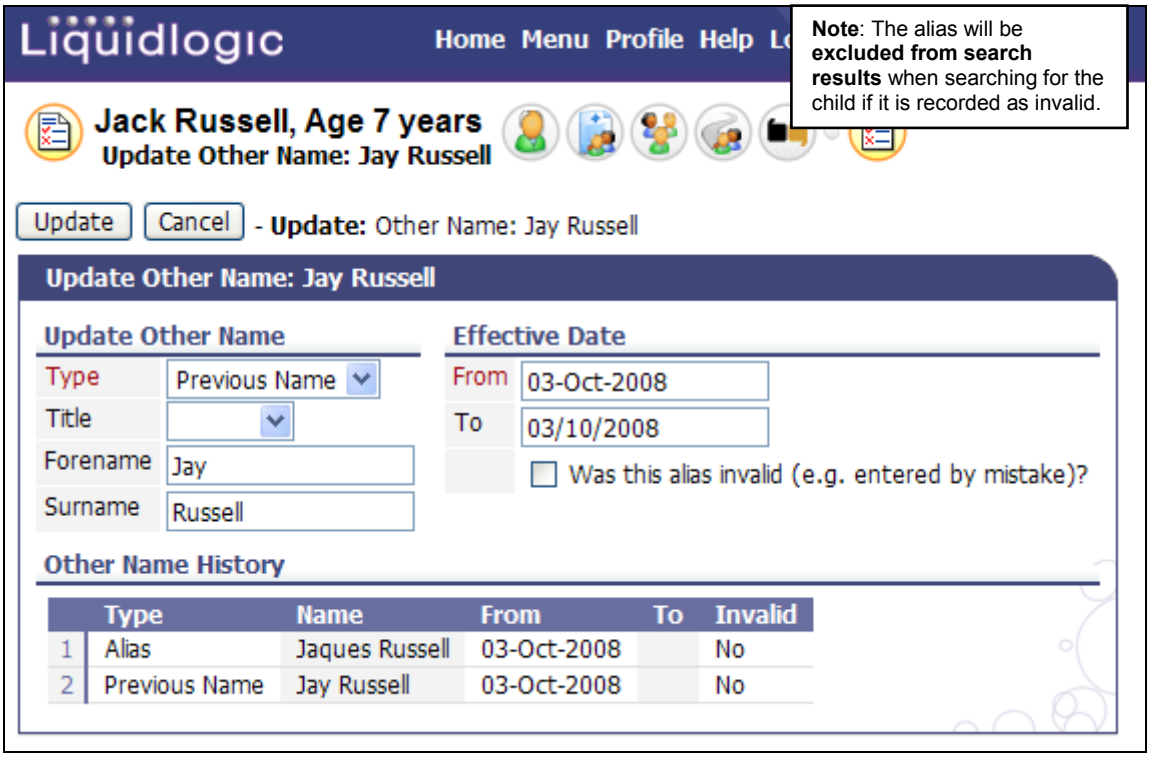


Invalid and Historical Other Names

Other Names that are either out of date or invalid can be updated by clicking on the **Add Other Name** link from the child's **Personal** tab.

1. Click on the **Other Name** to be changed from the **Other Name History** section
2. Click **Update**

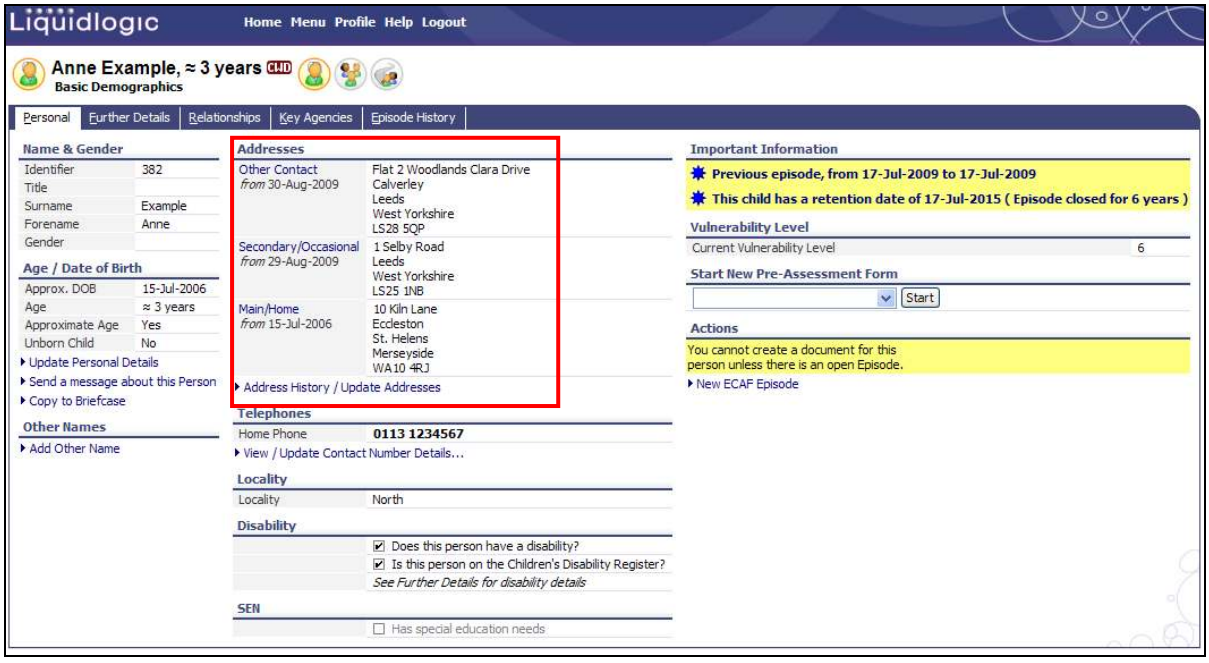
3. Enter an **end date** using the effective **To** field or select the **Was this Alias Invalid?** check box



4. Click **Update**

Addresses

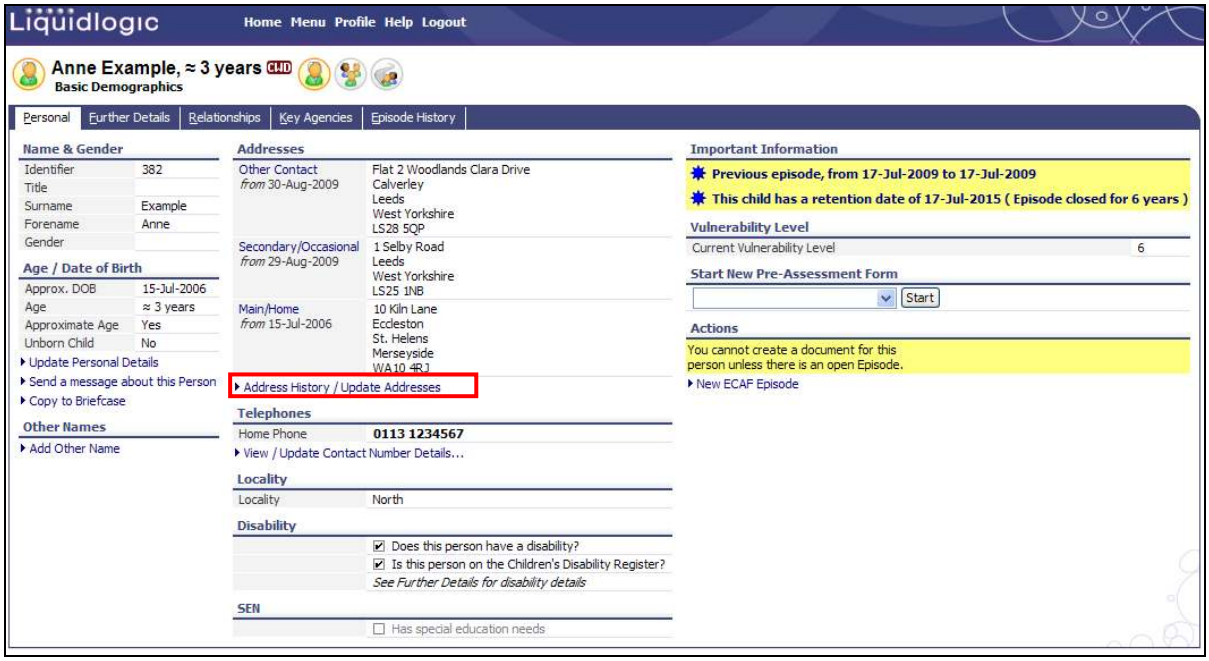
Under the **Addresses** section of the **Personal** tab you are able to view any Main/Home, Other Contact, Secondary/Occasional and Work addresses that are held against the child's record.



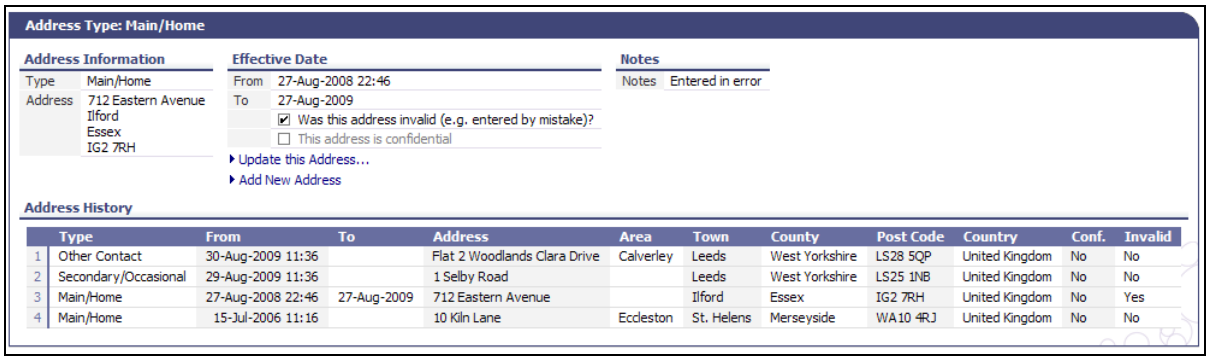
Adding a New Address

You are able to add a number of addresses for a child and keep a historical record of any addresses the child may have.

1. From the Personal tab, click **Address History/Update Addresses**

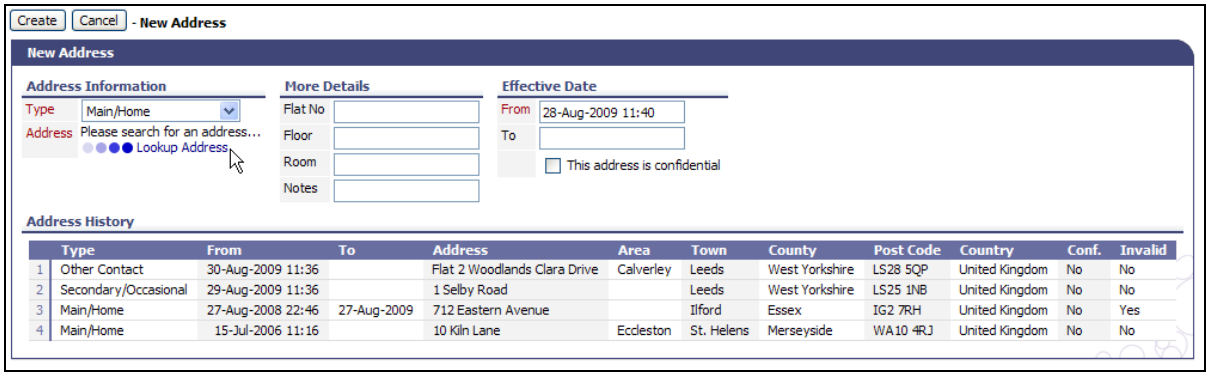

Liquidlogic
Home Menu Profile Help Logout
Anne Example, ≈ 3 years CHD
Basic Demographics
Personal
Further Details
Relationships
Key Agencies
Episode History
Name & Gender
Identifier 382
Title
Surname Example
Forename Anne
Gender
Age / Date of Birth
Approx. DOB 15-Jul-2006
Age ≈ 3 years
Approximate Age Yes
Unborn Child No
Update Personal Details
Send a message about this Person
Copy to Briefcase
Other Names
Add Other Name
Addresses
Other Contact from 30-Aug-2009 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP
Secondary/Occasional from 29-Aug-2009 1 Selby Road Leeds West Yorkshire LS25 1NB
Main/Home from 15-Jul-2006 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ
Address History / Update Addresses
Telephones
Home Phone 0113 1234567
View / Update Contact Number Details...
Locality
Locality North
Disability
Does this person have a disability?
Is this person on the Children's Disability Register?
See Further Details for disability details
SEN
Has special education needs
Important Information
Previous episode, from 17-Jul-2009 to 17-Jul-2009
This child has a retention date of 17-Jul-2015 (Episode closed for 6 years)
Vulnerability Level
Current Vulnerability Level 6
Start New Pre-Assessment Form
Start
Actions
You cannot create a document for this person unless there is an open Episode.
New ECAF Episode

2. Click **Add new Address**

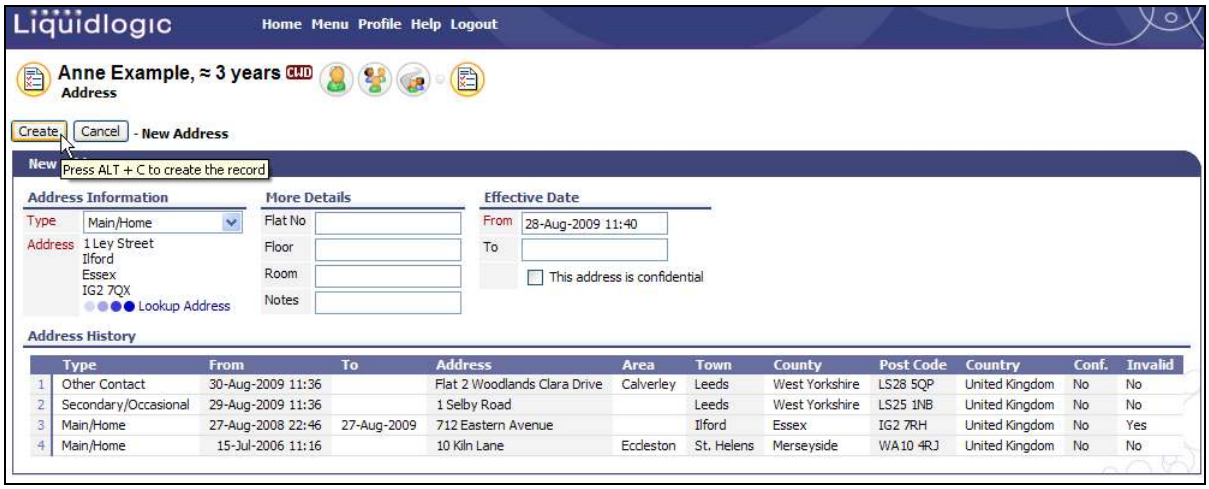

Address Type: Main/Home
Address Information
Type Main/Home
Address 712 Eastern Avenue Ilford Essex IG2 7RH
Effective Date
From 27-Aug-2008 22:46
To 27-Aug-2009
Was this address invalid (e.g. entered by mistake)?
This address is confidential
Update this Address...
Add New Address
Notes
Notes Entered in error
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
1 Other Contact 30-Aug-2009 11:36 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP United Kingdom No No
2 Secondary/Occasional 29-Aug-2009 11:36 1 Selby Road Leeds West Yorkshire LS25 1NB United Kingdom No No
3 Main/Home 27-Aug-2008 22:46 27-Aug-2009 712 Eastern Avenue Ilford Essex IG2 7RH United Kingdom No Yes
4 Main/Home 15-Jul-2006 11:16 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ United Kingdom No No

3. Choose the address **Type** from the dropdown selection
4. Select **Lookup Address** to enter the relevant details using your address gazetteer

For more information on using the gazetteer please refer to the eCAF **General** manual.

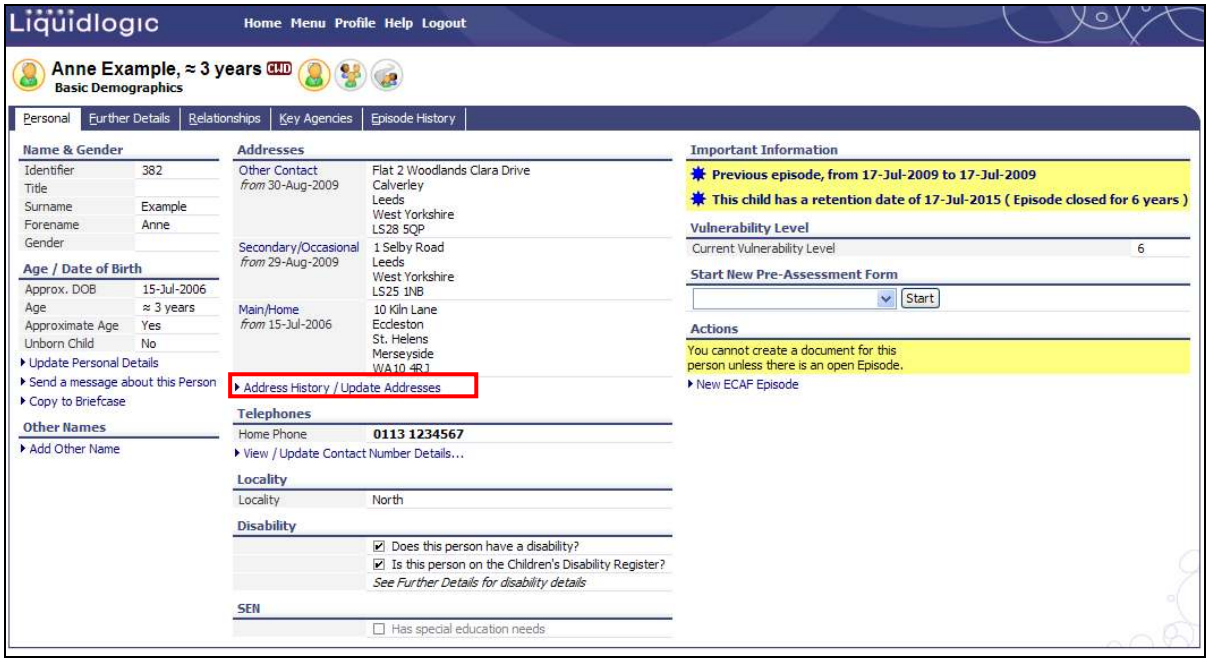

Create
Cancel
- New Address
New Address
Address Information
Type
Main/Home
Address
Please search for an address...
Lookup Address
More Details
Flat No
Floor
Room
Notes
Effective Date
From
28-Aug-2009 11:40
To
This address is confidential
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
1 Other Contact 30-Aug-2009 11:36 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP United Kingdom No No
2 Secondary/Occasional 29-Aug-2009 11:36 1 Selby Road Leeds West Yorkshire LS25 1NB United Kingdom No No
3 Main/Home 27-Aug-2008 22:46 27-Aug-2009 712 Eastern Avenue Ilford Essex IG2 7RH United Kingdom No Yes
4 Main/Home 15-Jul-2006 11:16 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ United Kingdom No No

5. Once the address has been entered, click **Create**


Liquidlogic
Home Menu Profile Help Logout
Anne Example, ≈ 3 years
Address
Create
Cancel
- New Address
Press ALT + C to create the record
Address Information
Type
Main/Home
Address
1 Ley Street
Ilford
Essex
IG2 7QX
Lookup Address
More Details
Flat No
Floor
Room
Notes
Effective Date
From
28-Aug-2009 11:40
To
This address is confidential
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
1 Other Contact 30-Aug-2009 11:36 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP United Kingdom No No
2 Secondary/Occasional 29-Aug-2009 11:36 1 Selby Road Leeds West Yorkshire LS25 1NB United Kingdom No No
3 Main/Home 27-Aug-2008 22:46 27-Aug-2009 712 Eastern Avenue Ilford Essex IG2 7RH United Kingdom No Yes
4 Main/Home 15-Jul-2006 11:16 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ United Kingdom No No

Updating an Address

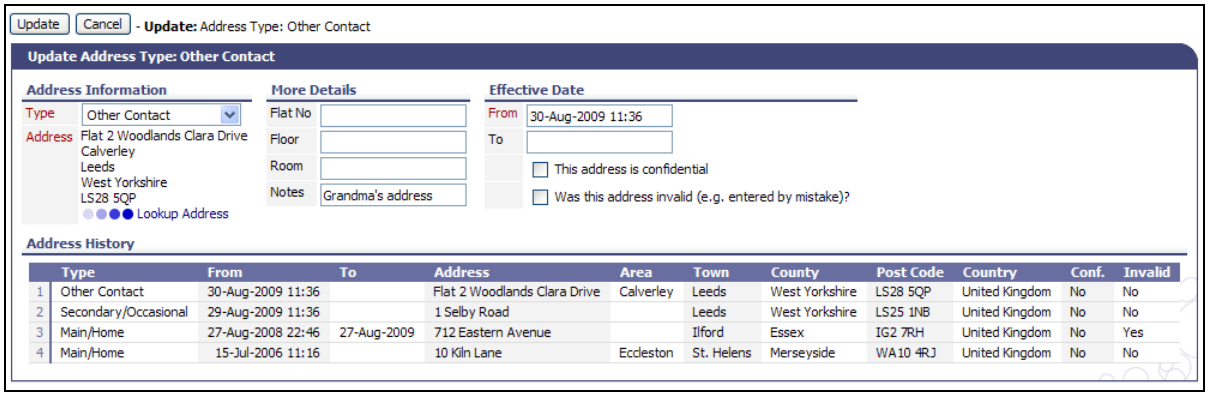
1. From the Personal tab, click **Address History/Update Addresses**



2. **Select the address** that you want to update from the Address History (bottom of screen). The selected address will be displayed in the address information section (on the left)
3. **Click Update this Address**

Address Type: Other Contact
Address Information
Type Other Contact
Address Flat 2 Woodlands Clara Drive
Calverley
Leeds
West Yorkshire
LS28 5QP
Effective Date
From 30-Aug-2009 11:36
To
Was this address invalid (e.g. entered by mistake)?
This address is confidential
Update this Address...
Add New Address
Notes
Notes Grandma's address
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
1 Other Contact 30-Aug-2009 11:36 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP United Kingdom No No
2 Secondary/Occasional 29-Aug-2009 11:36 1 Selby Road Leeds West Yorkshire LS25 1NB United Kingdom No No
3 Main/Home 27-Aug-2008 22:46 27-Aug-2009 712 Eastern Avenue Ilford Essex IG2 7RH United Kingdom No Yes
4 Main/Home 15-Jul-2006 11:16 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ United Kingdom No No

4. Enter the required information into the **More Details** section. If the address needs to be marked as confidential select the **This Address is Confidential** check box. If the address is incorrect or entered by mistake mark the **Was this address invalid?** check box
5. Click **Update**

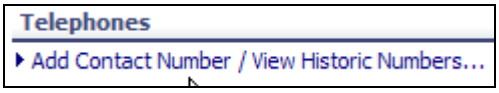

Update
Cancel
- Update: Address Type: Other Contact
Update Address Type: Other Contact
Address Information
Type
Other Contact
Address
Flat 2 Woodlands Clara Drive
Calverley
Leeds
West Yorkshire
LS28 5QP
Lookup Address
More Details
Flat No
Floor
Room
Notes
Grandma's address
Effective Date
From
30-Aug-2009 11:36
To
This address is confidential
Was this address invalid (e.g. entered by mistake)?
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
1 Other Contact 30-Aug-2009 11:36 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP United Kingdom No No
2 Secondary/Occasional 29-Aug-2009 11:36 1 Selby Road Leeds West Yorkshire LS25 1NB United Kingdom No No
3 Main/Home 27-Aug-2008 22:46 27-Aug-2009 712 Eastern Avenue Ilford Essex IG2 7RH United Kingdom No Yes
4 Main/Home 15-Jul-2006 11:16 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ United Kingdom No No

NOTE: Addresses can be added or updated but cannot be deleted. Please refer to your System Administrator for further guidance.

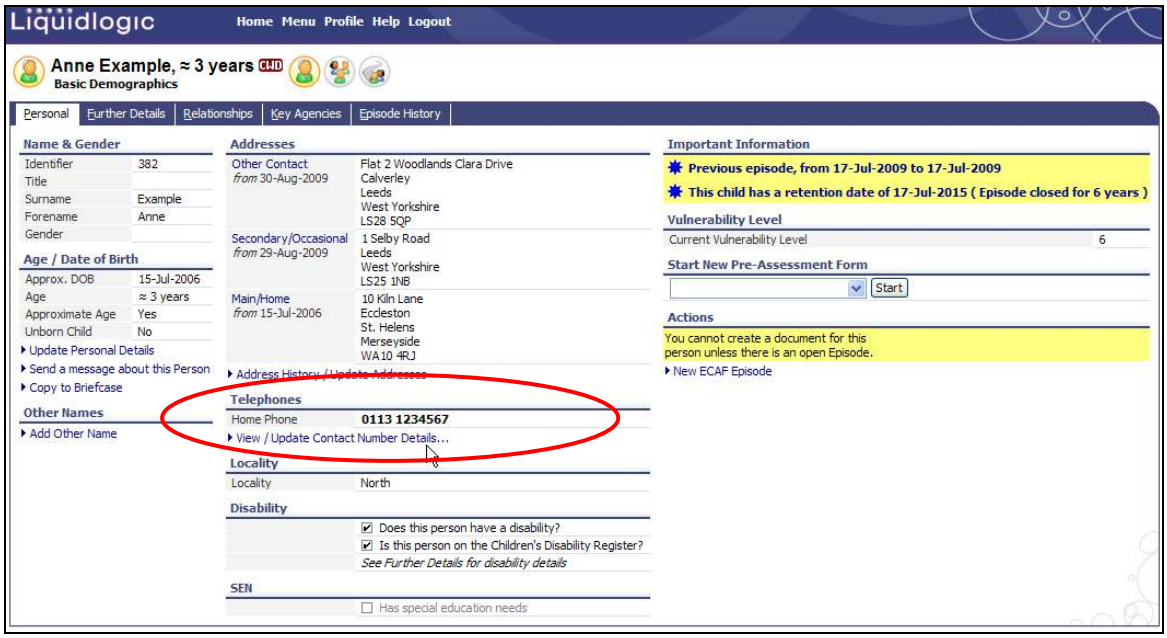
Contact Telephone Numbers

Adding a Contact Telephone Number

1. Click **Add Contact Number/View Historic Numbers** from the Telephones section of the Personal tab



TIP: if a telephone number has previously been entered, this link will change to **View/Update Contact Number Details**


Liquidlogic
Home Menu Profile Help Logout
Anne Example, ≈ 3 years CHD
Basic Demographics
Personal Further Details Relationships Key Agencies Episode History
Name & Gender
Identifier 382
Title
Surname Example
Forename Anne
Gender
Age / Date of Birth
Approx. DOB 15-Jul-2006
Age ≈ 3 years
Approximate Age Yes
Unborn Child No
Update Personal Details
Send a message about this Person
Copy to Briefcase
Other Names
Add Other Name
Addresses
Other Contact from 30-Aug-2009 Flat 2 Woodlands Clara Drive Calverley Leeds West Yorkshire LS28 5QP
Secondary/Occasional from 29-Aug-2009 1 Selby Road Leeds West Yorkshire LS25 1NB
Main/Home from 15-Jul-2006 10 Kiln Lane Eccleston St. Helens Merseyside WA10 4RJ
Address History / Update Addresses
Telephones
Home Phone 0113 1234567
View / Update Contact Number Details...
Locality
Locality North
Disability
Does this person have a disability?
Is this person on the Children's Disability Register?
See Further Details for disability details
SEN
Has special education needs
Important Information
Previous episode, from 17-Jul-2009 to 17-Jul-2009
This child has a retention date of 17-Jul-2015 (Episode closed for 6 years)
Vulnerability Level
Current Vulnerability Level 6
Start New Pre-Assessment Form
Start
Actions
You cannot create a document for this person unless there is an open Episode.
New ECAF Episode

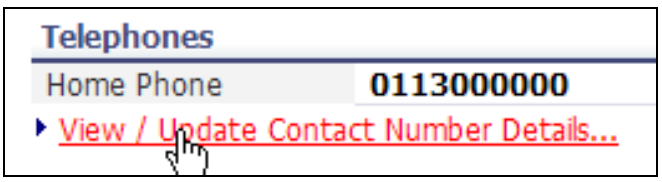
2. Choose the **Telephone Type** from the drop-down selection
3. Enter the **Contact Telephone Number**
4. Enter any relevant **Notes**
5. Select the **Primary Contact** checkbox if this is the main contact telephone number
6. The **Start Date** will automatically default to today's date but can be amended if required
7. Click **Create Record**

8. Click **Close** to the return to the child's demographics

Adding Additional Contact Telephone Numbers

Any recorded contact telephone numbers will be displayed in the Personal tab. The Primary Telephone Number will be in bold.

1. Click **Update Contact Numbers** from the Telephones section of the Personal tab



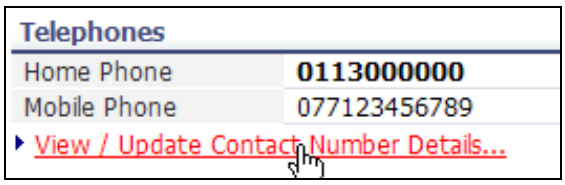
2. Click **New Number**

3. Enter the details for the new Telephone Number
4. Click **Create Record**

Any recorded telephone numbers will be listed:

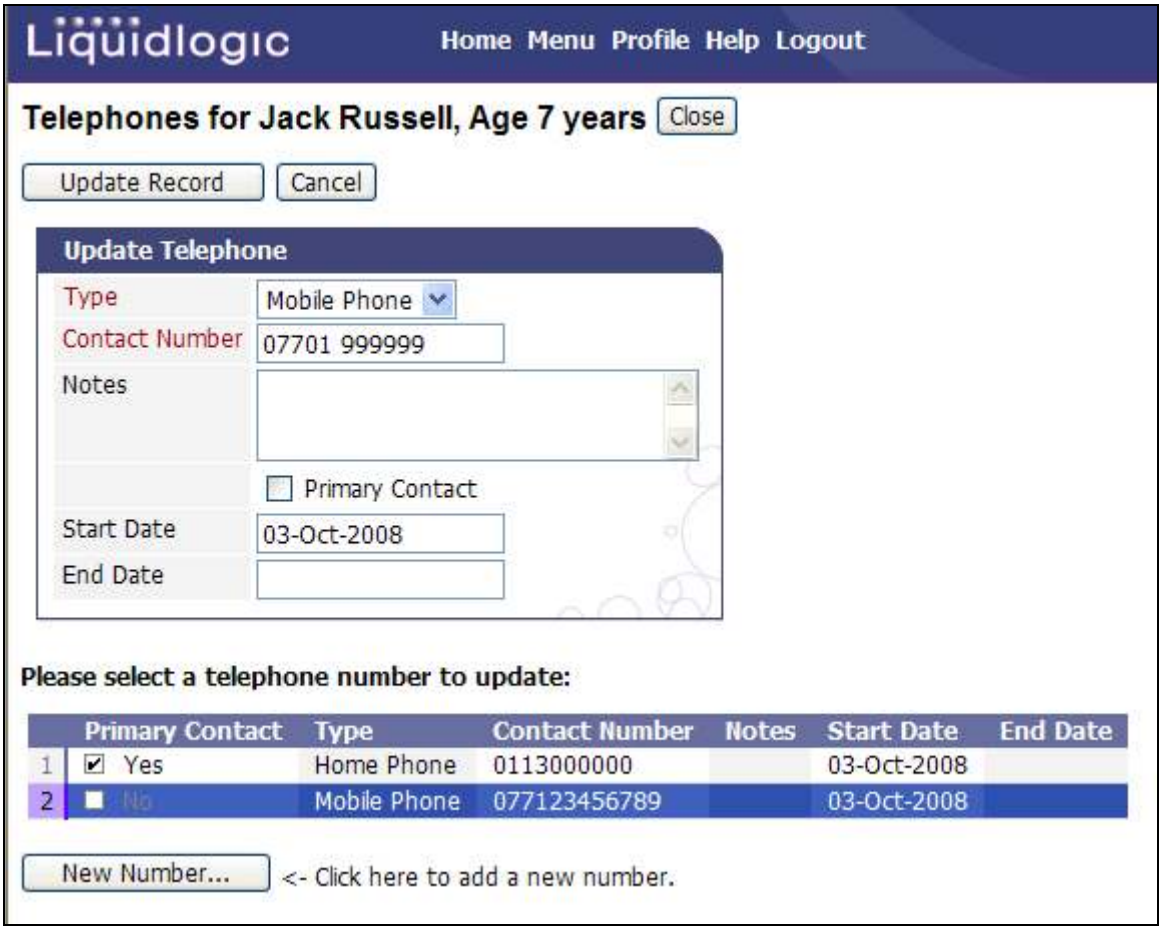
Updating Contact Telephone Numbers

1. Click **Update Contact Numbers** from the Telephones section of the Personal tab



3. Click on the Telephone Number you wish to update

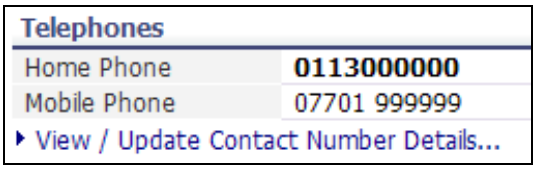
4. Make the required changes and then click **Update Record**



5. Click **Close** to the return to the child's demographics

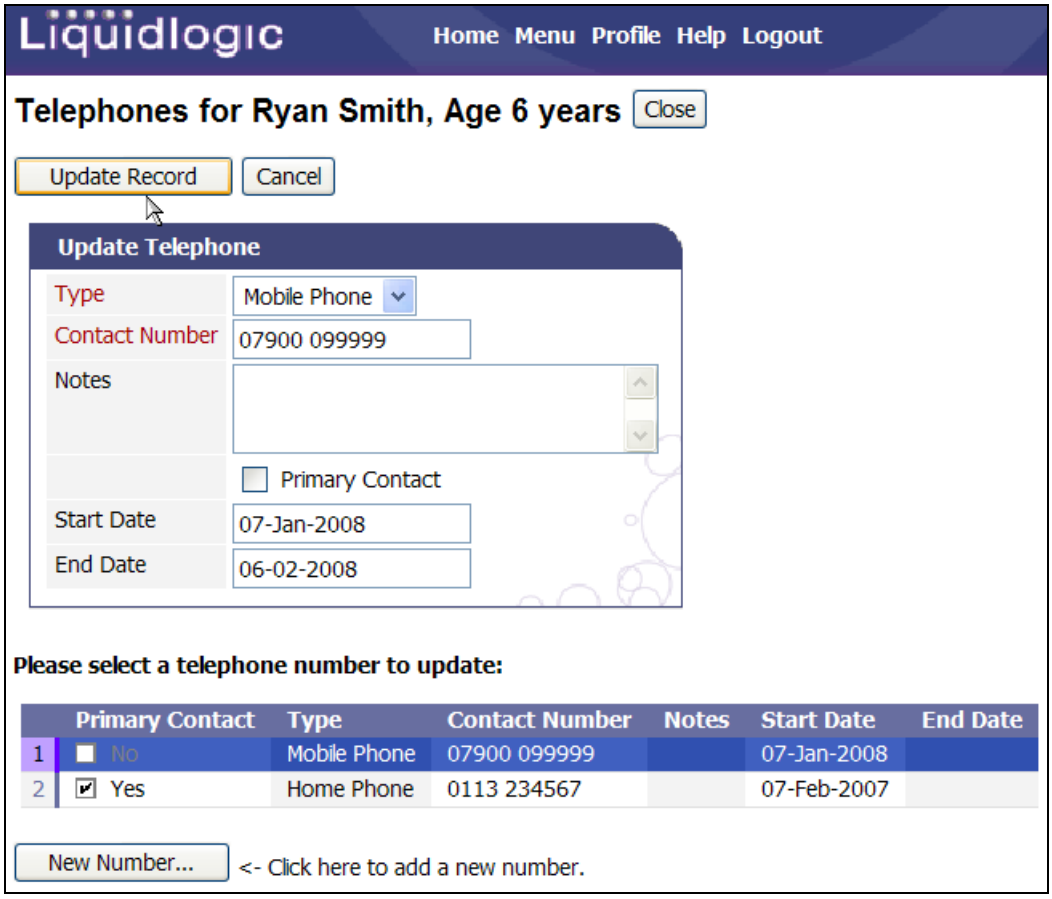
Removing a Contact Telephone Number

1. Click **Update Contact Numbers** from the Telephones section of the Personal tab

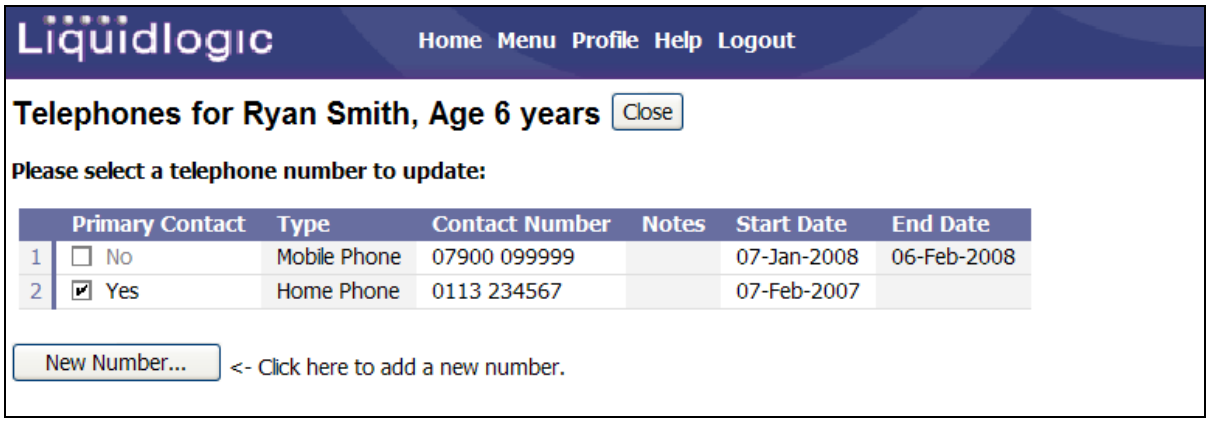


2. Click on the Telephone Number you wish to remove

3. Enter an **End Date** and then click **Update Record**



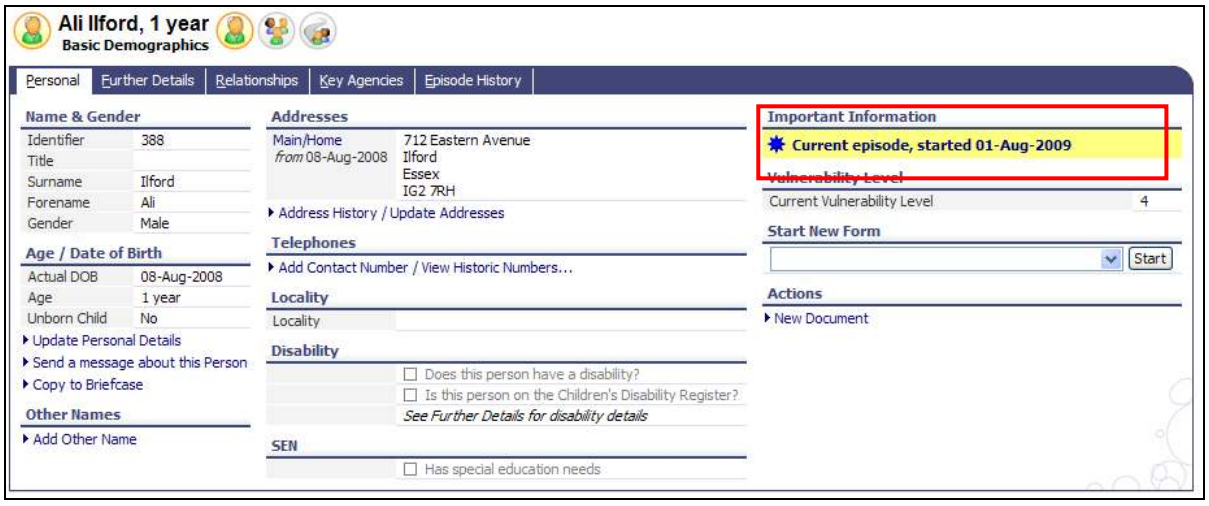
The number will remain in the list of telephone numbers but will not be visible in the Personal tab.

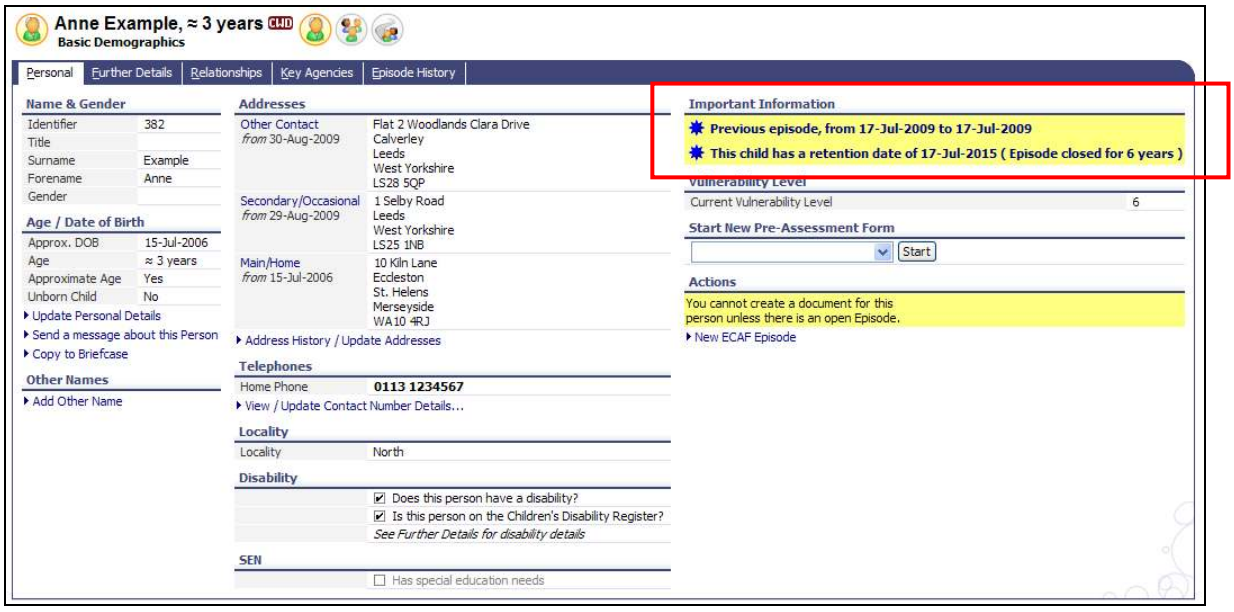


Important Information

The **Important Information** section of the **Personal** tab will display any alerts of important information that are recorded against the child.

For example, information that you will be alerted about may include Current and Previous eCAF Episodes.

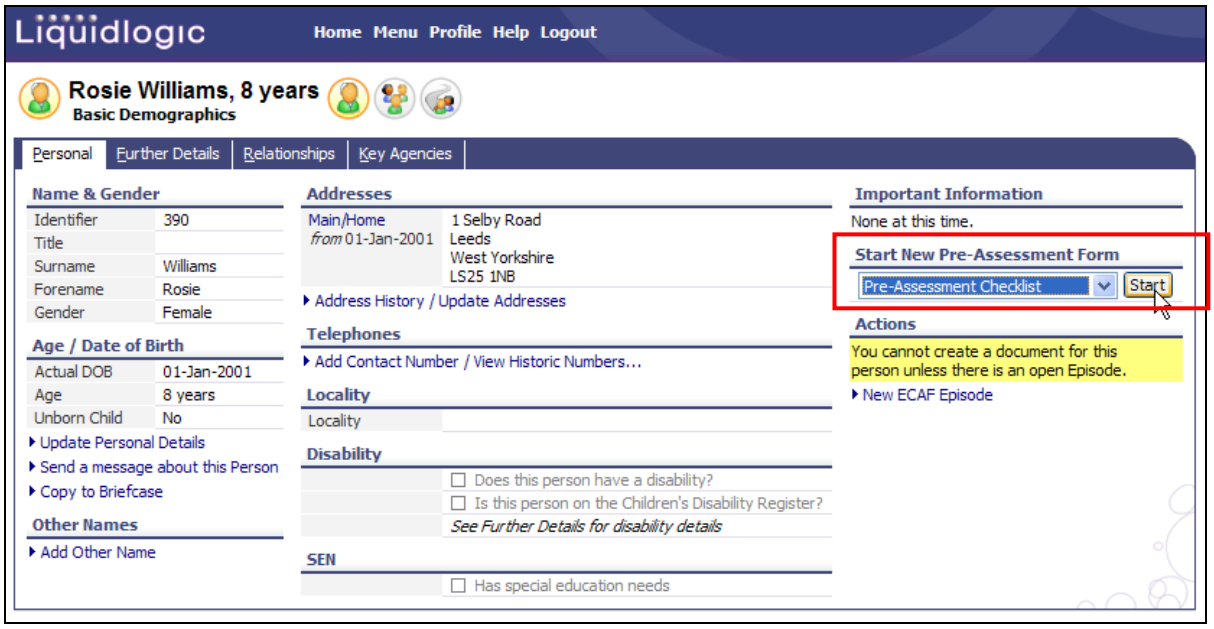




Starting a Pre-Assessment Form

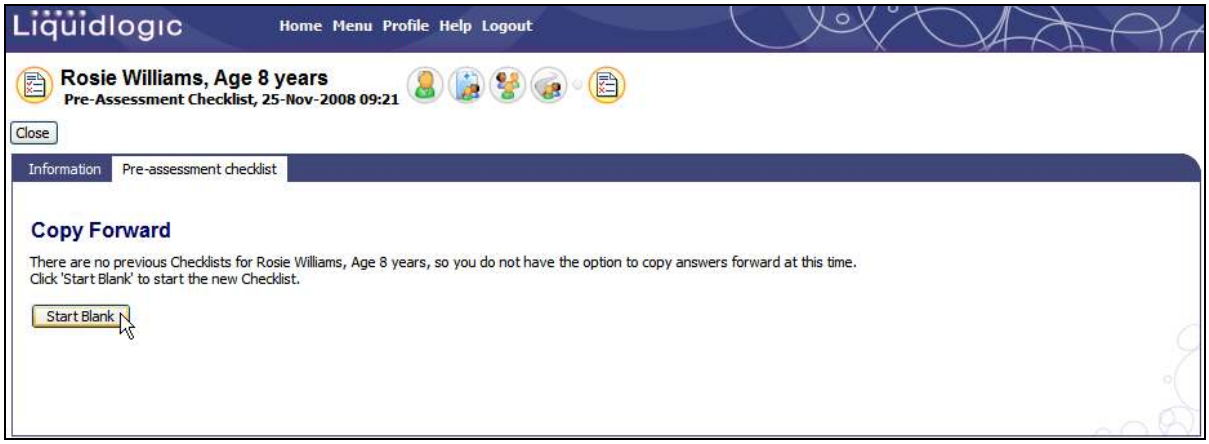
A pre-assessment can be created for a child/young person provided they do not have a current episode.

1. From the Personal tab of the Demographics, select the Pre-Assessment Checklist from the **Start New Pre-Assessment Form** picklist
2. Click **Start**

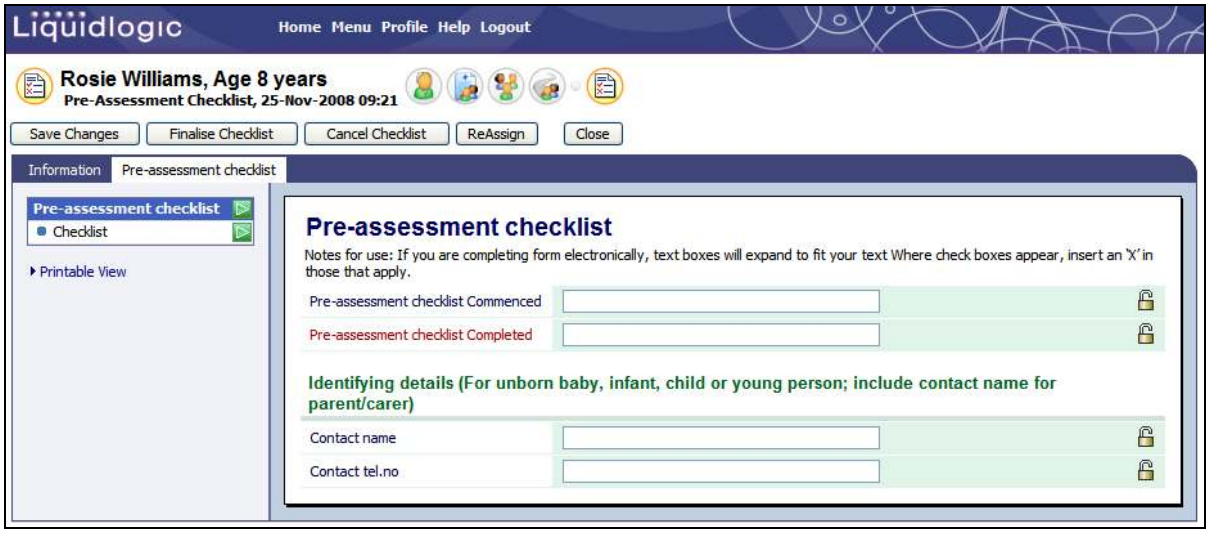


3. Click **Start Blank** to create a blank pre-assessment or select previously completed pre-assessments and then select the **Copy Forward** button

NOTE: A Pre-Assessment form can be created as many times as required.

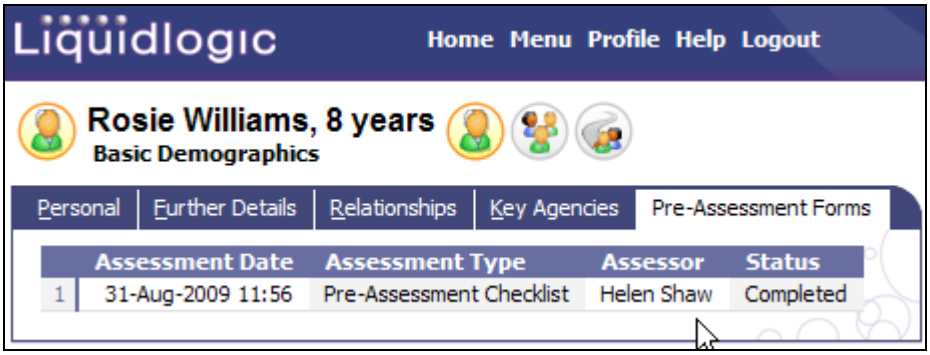

Liquidlogic
Home Menu Profile Help Logout
Rosie Williams, Age 8 years
Pre-Assessment Checklist, 25-Nov-2008 09:21
Close
Information
Pre-assessment checklist
Copy Forward
There are no previous Checklists for Rosie Williams, Age 8 years, so you do not have the option to copy answers forward at this time.
Click 'Start Blank' to start the new Checklist.
Start Blank

4. Complete the Pre-Assessment as required and click **Finalise** Checklist and then click **OK**


Liquidlogic
Home Menu Profile Help Logout
Rosie Williams, Age 8 years
Pre-Assessment Checklist, 25-Nov-2008 09:21
Save Changes
Finalise Checklist
Cancel Checklist
ReAssign
Close
Information
Pre-assessment checklist
Pre-assessment checklist
Checklist
Printable View
Pre-assessment checklist
Notes for use: If you are completing form electronically, text boxes will expand to fit your text Where check boxes appear, insert an 'X' in those that apply.
Pre-assessment checklist Commenced
Pre-assessment checklist Completed
Identifying details (For unborn baby, infant, child or young person; include contact name for parent/carer)
Contact name
Contact tel.no

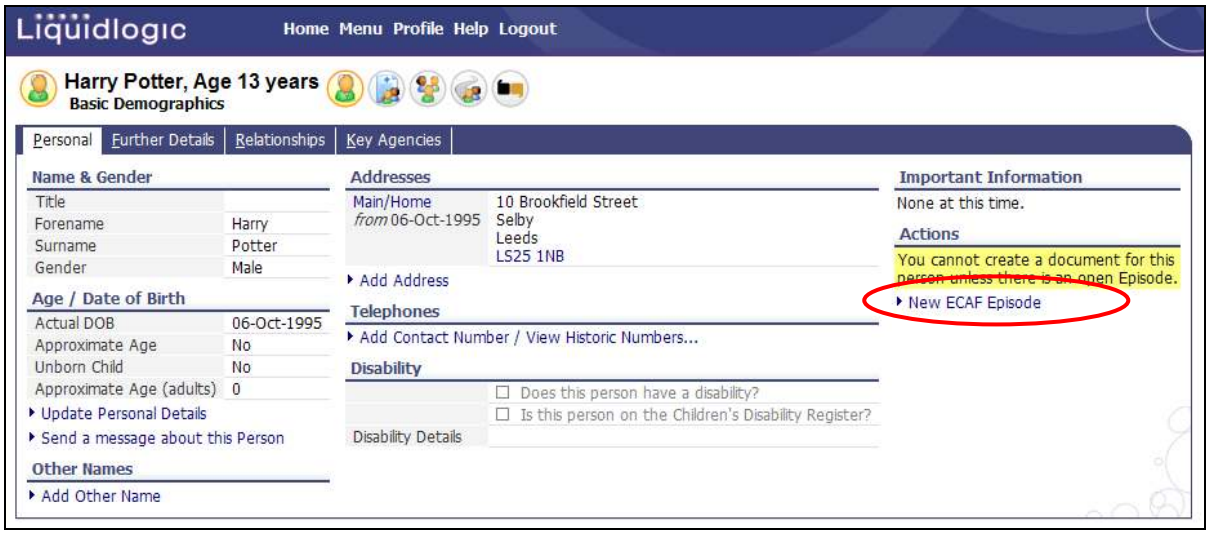
A list of previously completed pre-assessments can be found on the **Pre-Assessment Forms** tab in the Demographics, see example below:

NOTE: The Pre-Assessment Forms tab will only be displayed if the Pre-Assessment Checklist has been completed.



New eCAF Episode

A new eCAF episode can be started from the personal tab on the child demographics record. If a current CAF episode exists this will be indicated on the **Important Information** section of the personal tab and the New eCAF Episode link will be unavailable.

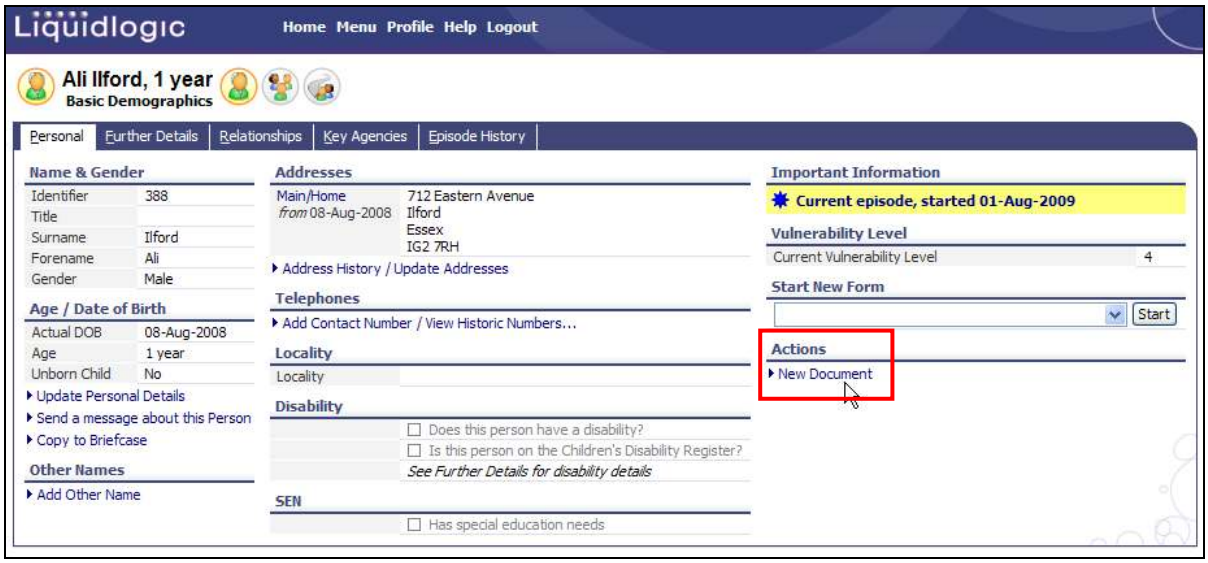


If a current ECAF episode exists the option to create a **New ECAF Episode** will not appear on the child's demographics.

NOTE: Please refer to the e**CAF Episode** manual for further information.

New Documents

The action to create a **New Document** will only appear if the child/young person has a current ECAF episode.



NOTE: For further guidance on creating a new eCAF episode refer to the **eCAF Episode** manual.

The Document Editor allows users to create and open documents 'in-place' within Protocol applications. System Administrators can add new document templates quickly and easily and users will be able to open new documents, edit them where necessary and save them against a person's record. Users will also be able to set security against these documents.

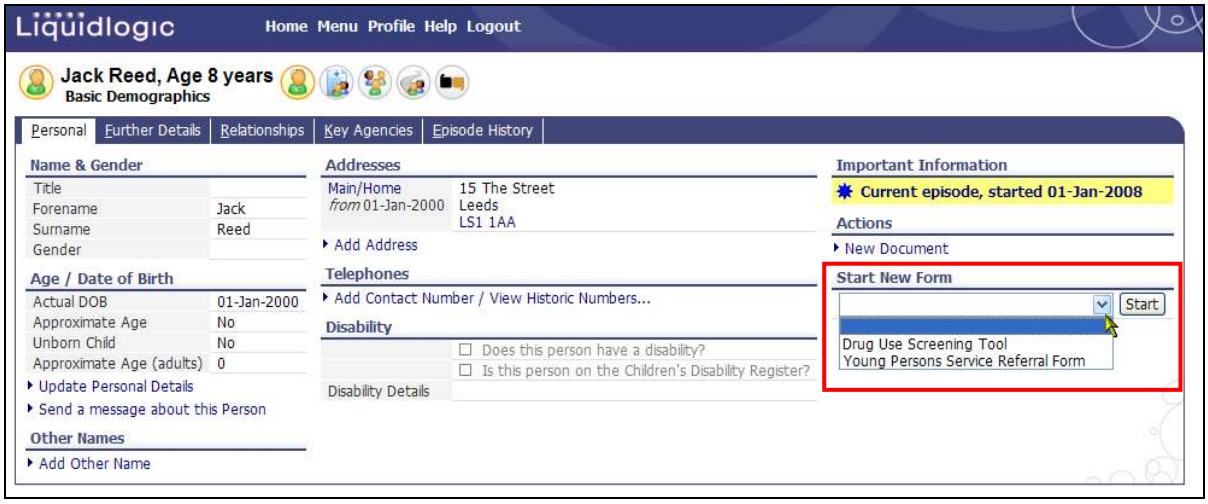
For further guidance on creating a new document please refer to the **eCAF Document Editor** Manual.

Starting a new Form

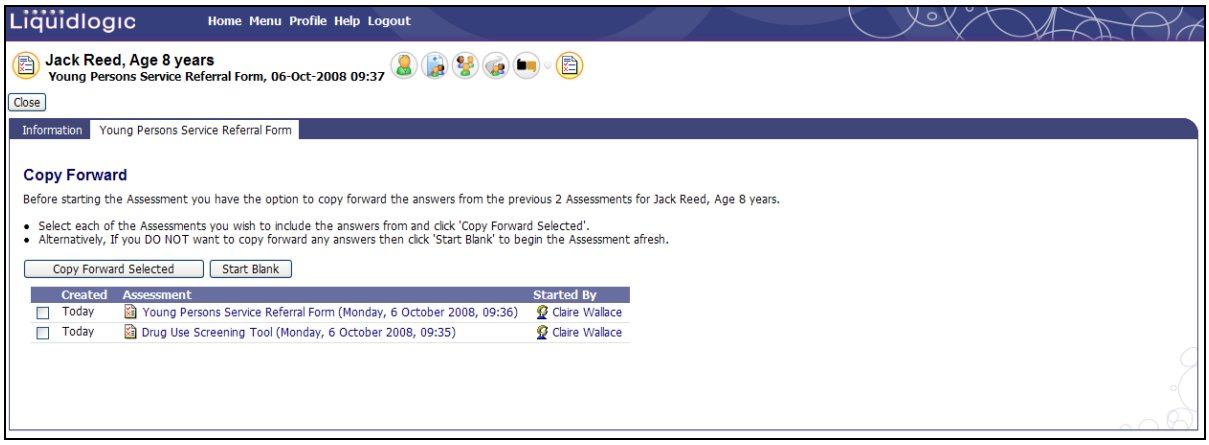
Ad-hoc forms may be started from the Personal tab.

NOTE: these forms are client specific, contact your System Administrator for further details.

1. From the **Start New Form** area of the Personal tab, use the drop-down list to select the form

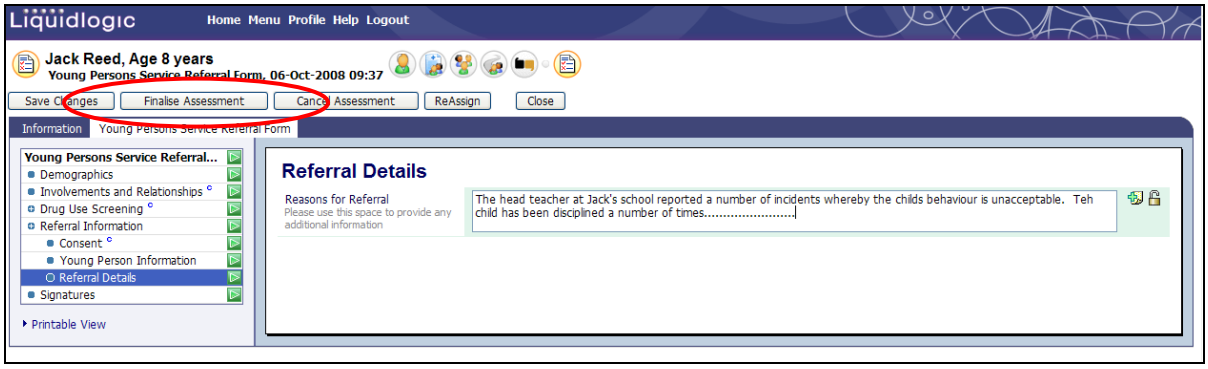


2. Click on the required form, and then click **Start**
3. Click **Start Blank** to start a blank version of this form
   OR
4. Use the checkboxes to select any previous assessments you wish to copy forward into this form and click **Copy Forward Selected**


Liquidlogic
Home Menu Profile Help Logout
Jack Reed, Age 8 years
Young Persons Service Referral Form, 06-Oct-2008 09:37
Close
Information
Young Persons Service Referral Form
Copy Forward
Before starting the Assessment you have the option to copy forward the answers from the previous 2 Assessments for Jack Reed, Age 8 years.
Select each of the Assessments you wish to include the answers from and click 'Copy Forward Selected'.
Alternatively, If you DO NOT want to copy forward any answers then click 'Start Blank' to begin the Assessment afresh.
Copy Forward Selected
Start Blank
Created
Assessment
Started By
Today
Young Persons Service Referral Form (Monday, 6 October 2008, 09:36)
Claire Wallace
Today
Drug Use Screening Tool (Monday, 6 October 2008, 09:35)
Claire Wallace

5. Use the checkboxes to select any previous assessments you wish to copy forward into this form and click **Copy Forward Selected**
6. Complete the form, as normal, and click **Finalise Assessment**

For further guidance on completing an assessment please refer to the eCAF Episode Manual

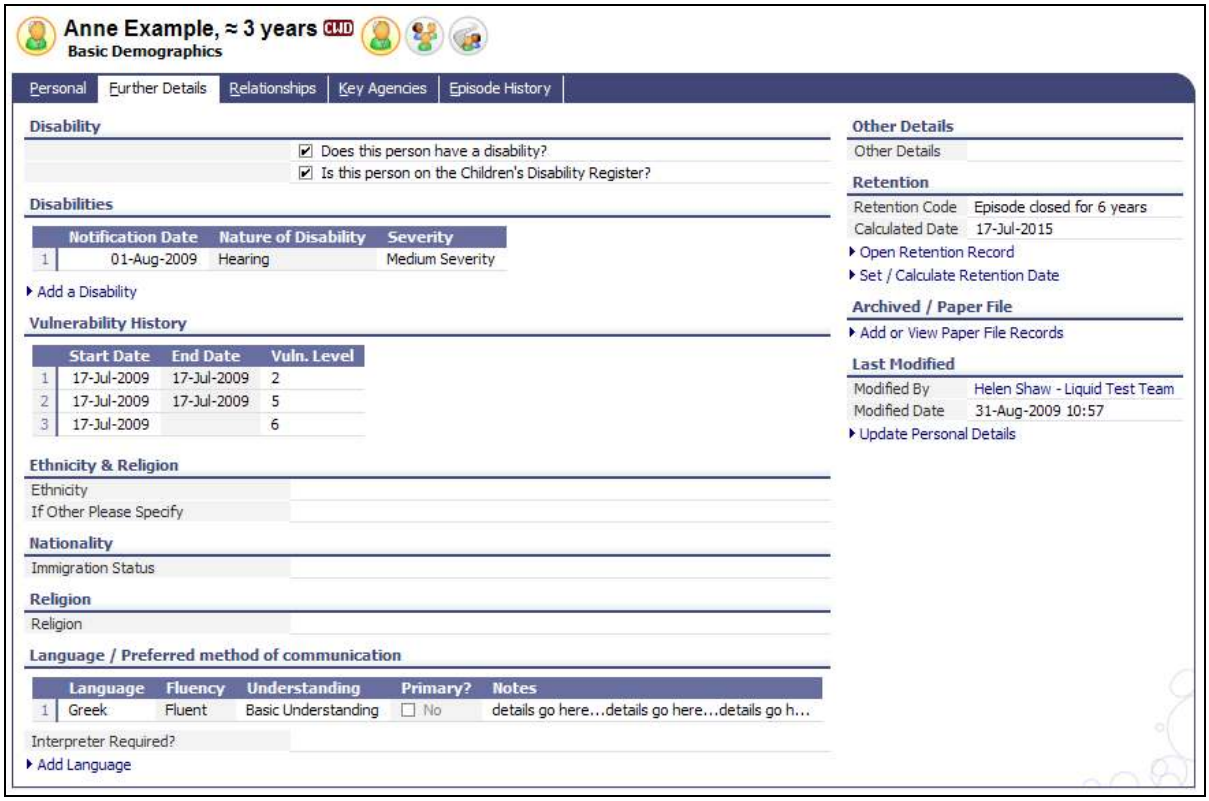


The completed form will be listed under the Standalone Assessments area of the Activities tab within the Episode Details tabs.

For further guidance on viewing activities on eCAF Episodes please refer to the **eCAF Episode Details** Manual.

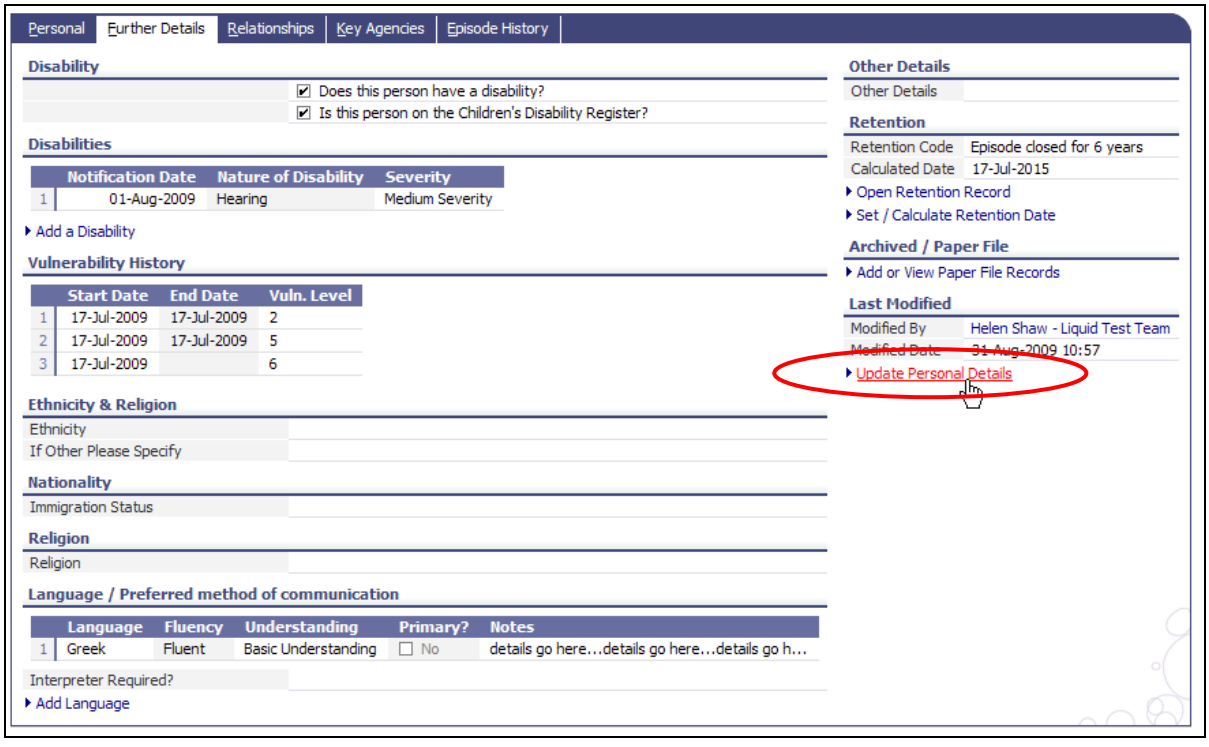
Further Details

The **Further Details** tab contains sections of further information relating to the child's disabilities, vulnerability history, ethnicity, nationality, religion, language as well as retention and archived paper file details. The 'Last Modified' section displays when and by whom this record has last been updated



Updating Further Details

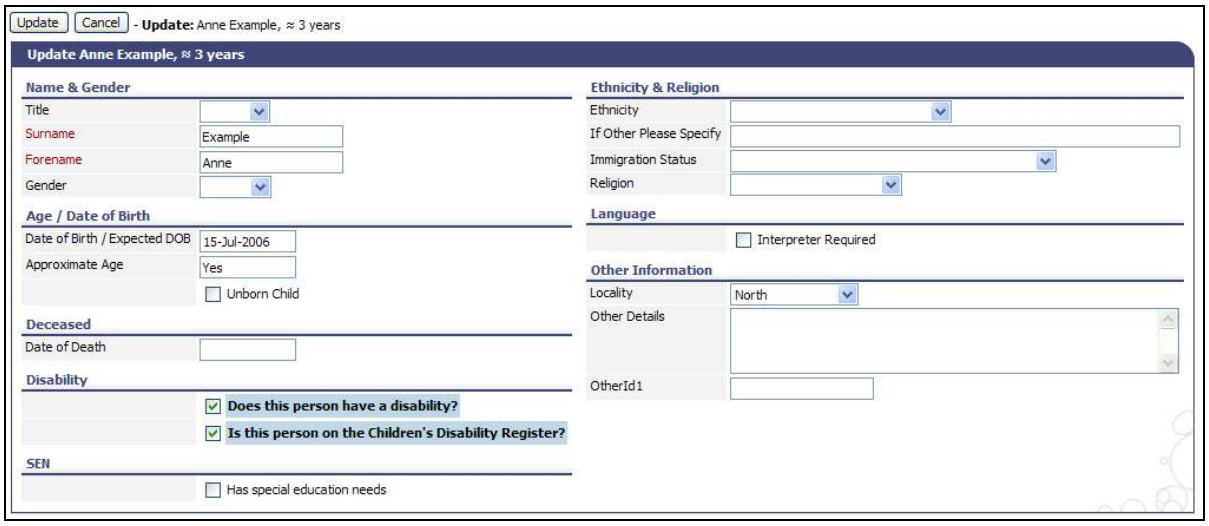
1. Click **Update Personal Details** from the Further Details tab (or click Update Personal Details from the Personal tab)



The screen will default to updating the main demographics (which includes fields held on the Personal and Further Details tab).

2. Specify the **Ethnicity**, **Immigration Status**, **Religion**, **Interpreter Required** and/or any **Other Details**
3. After entering the further information, click **Update**

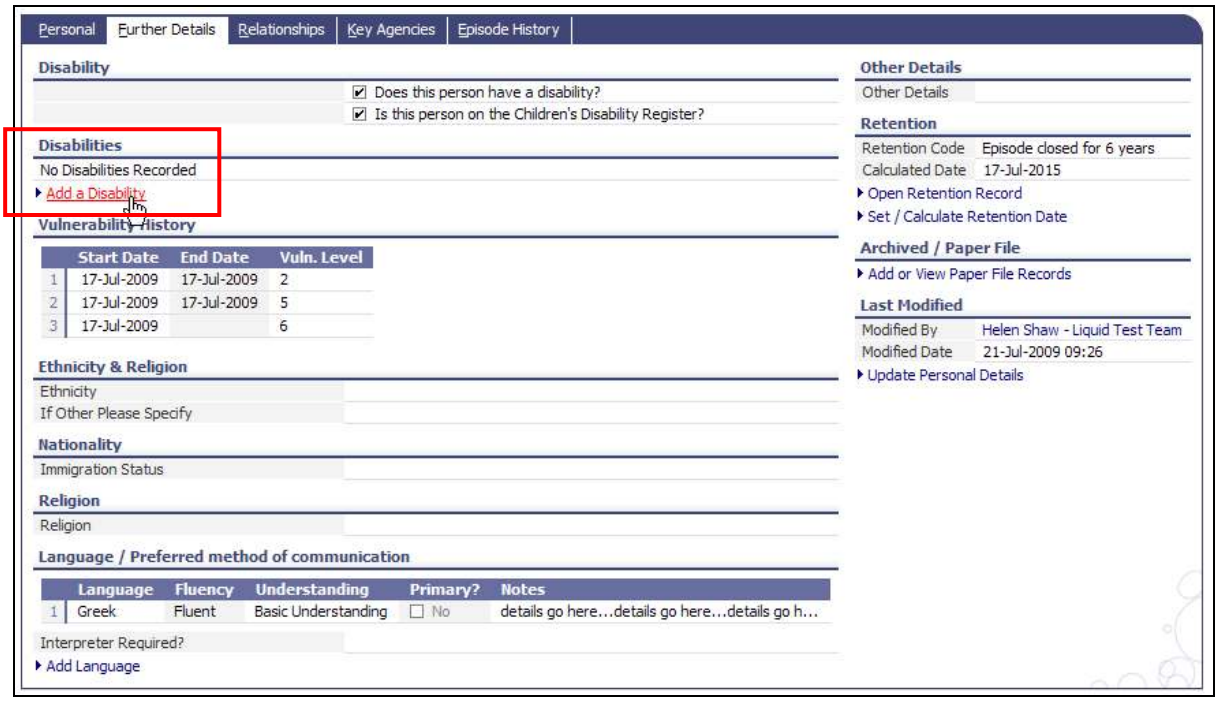
NOTE Please see the **Adding a Disability** section in this user manual for guidance on recording disabilities.



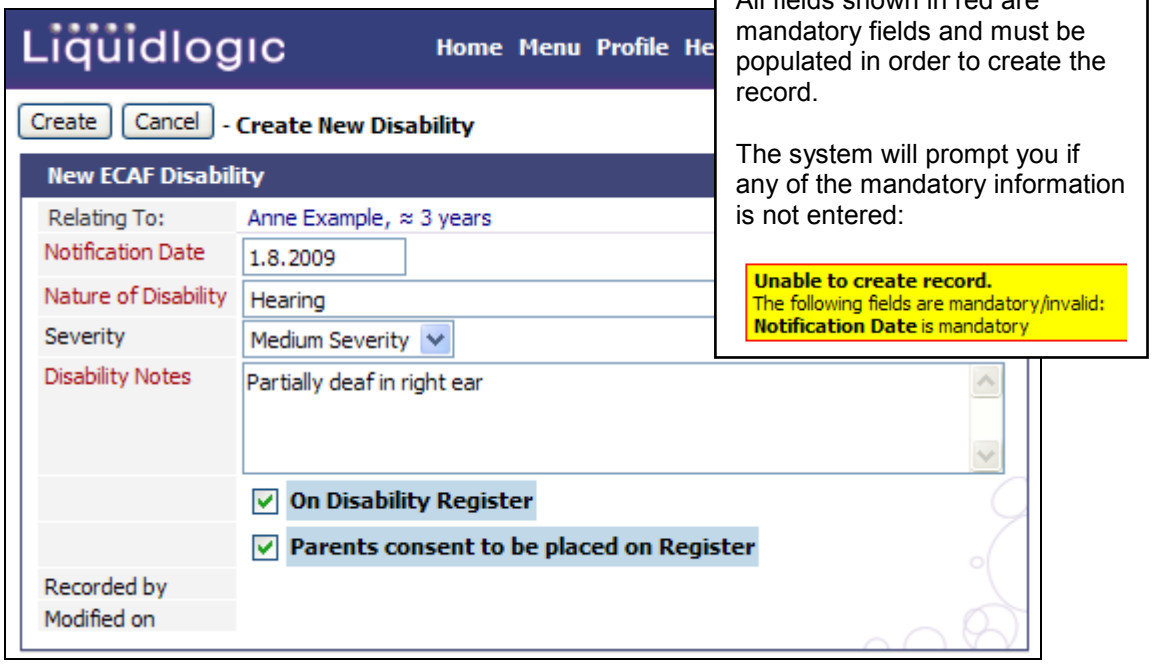
Adding a Disability

Disabilities can be recorded, updated, viewed and deleted from the Further Details tab.

1. Click on the link **Add a Disability** from the **Further Details** tab



2. Enter the **Notification Date**
3. Select a **Nature of Disability** from the list
4. Enter a **Severity**
5. Enter any **Disability Notes** and then click **Create**



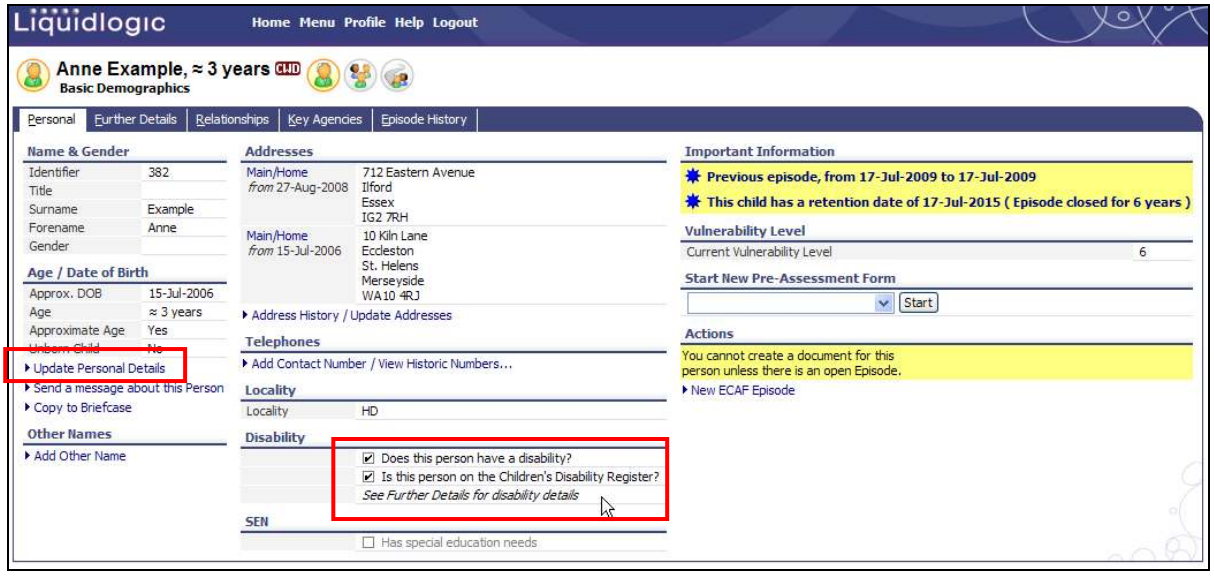
NOTE: Only one disability can be entered at a time. Repeat the above steps to add further disabilities.

The **Further Details** tab will updated to reflect this. A child with disabilities icon will also be generated next to the child's name

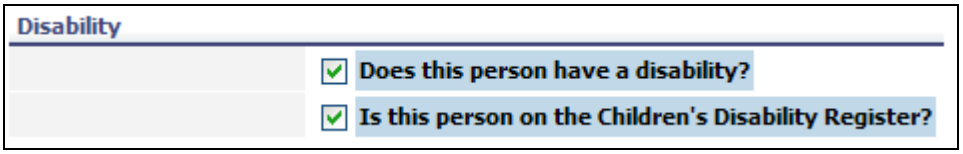
NOTE: Only one disability can be entered at a time. Repeat the above steps to add further disabilities.

The Personal tab will also be updated to reflect the selected checkboxes for:

- Does the person have a disability
- Is this person on the Children's Disability Register



TIP: Click **Update Personal Details** from the Personal tab to select/deselect the Disability checkboxes:

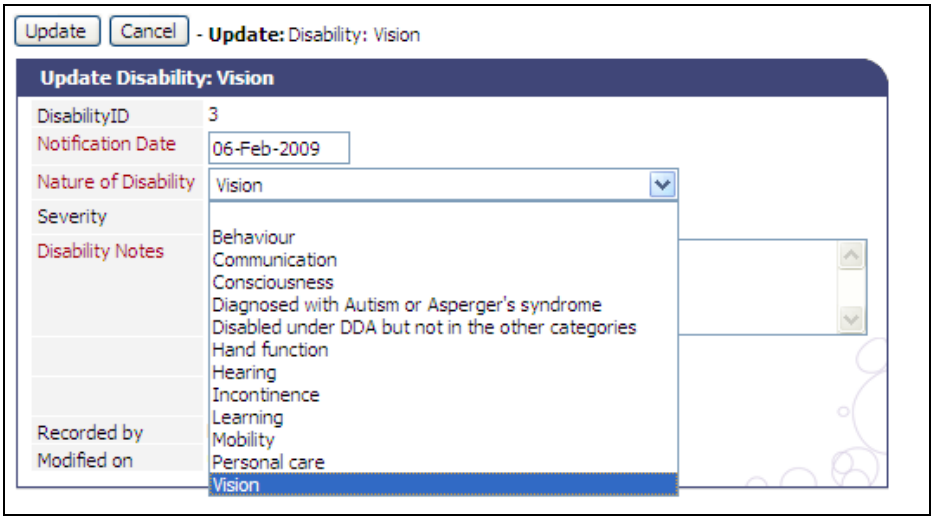


Updating a Disability

1. From the **Further Details** tab, click on the **disability** that requires updating

2. More detailed information will be displayed. Click **Update Disability**

2. Enter the updated information and click **Update**



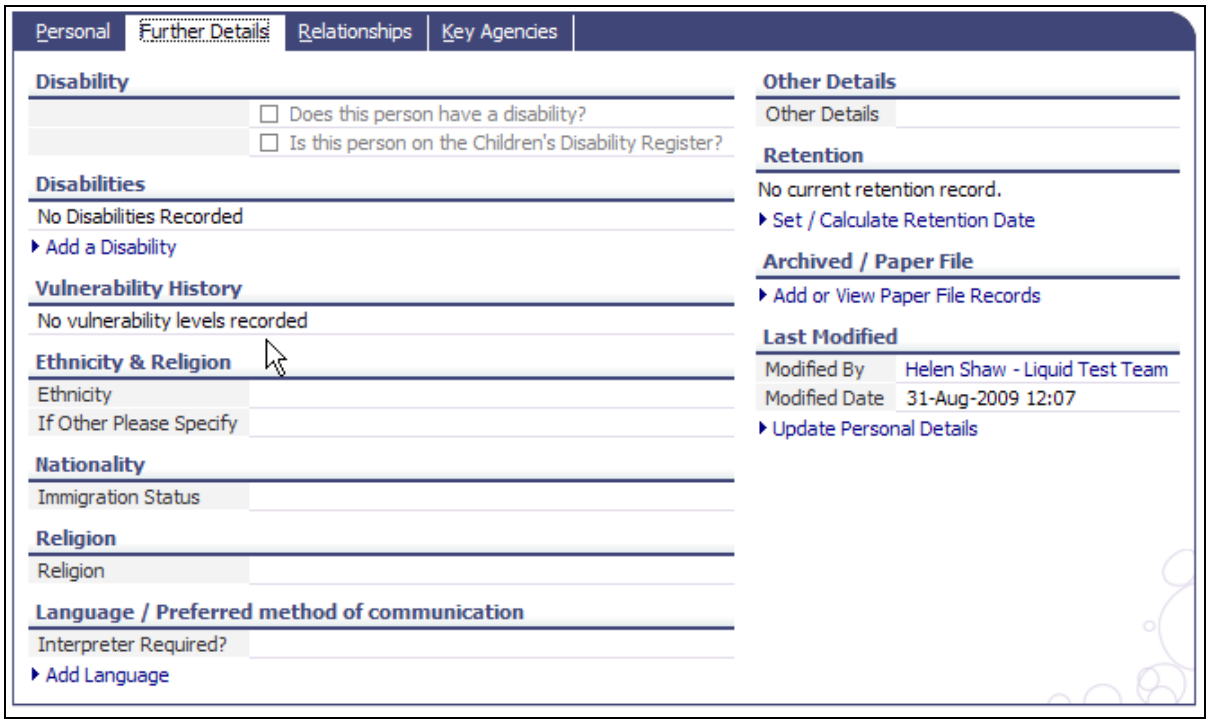
Deleting a Disability

1. From the **Further Details** tab, click on the disability you wish to delete
2. More detailed information will be displayed. Click **Delete Disability**

3. Click **OK** to confirm. The Further Details tab will be displayed with the deleted disability removed

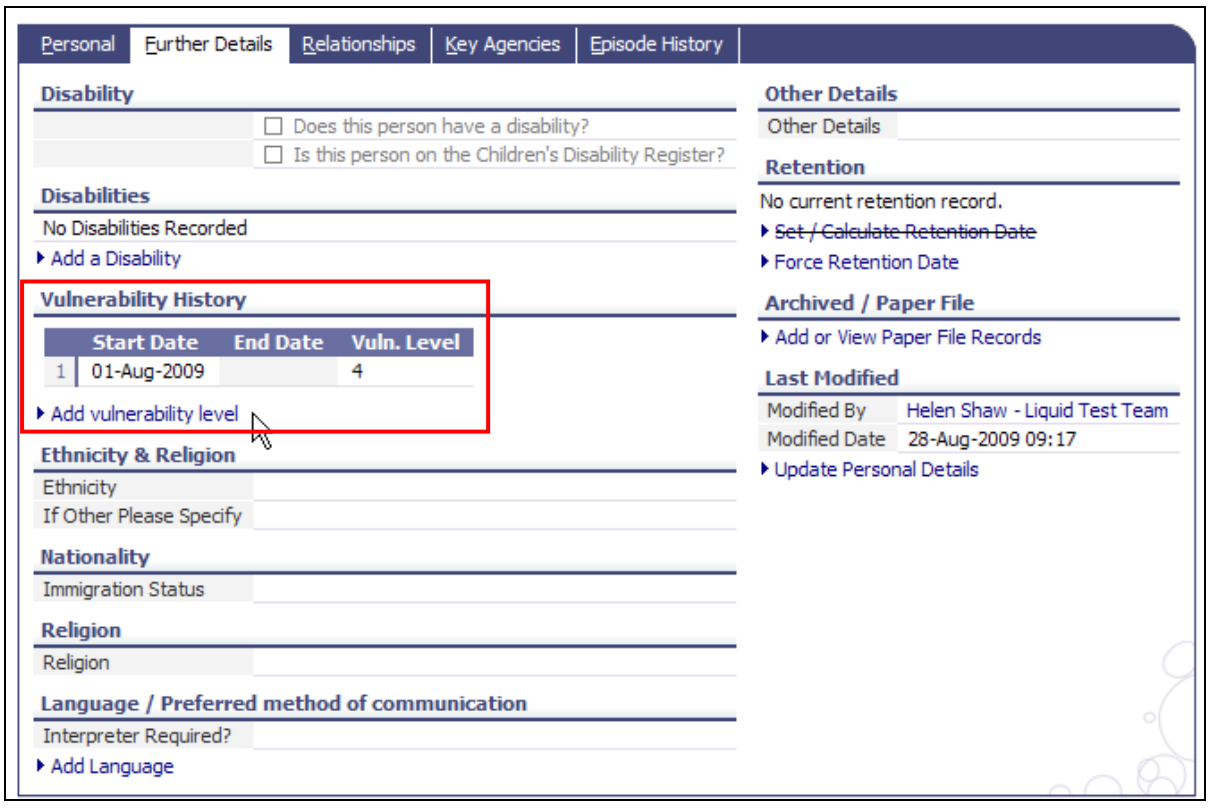
Vulnerability History

The Vulnerability Level can be added when starting a new eCAF episode, see example below. Once this has been created it can be updated from the Further Details tab in order to track the child's vulnerability throughout their CAF episode.

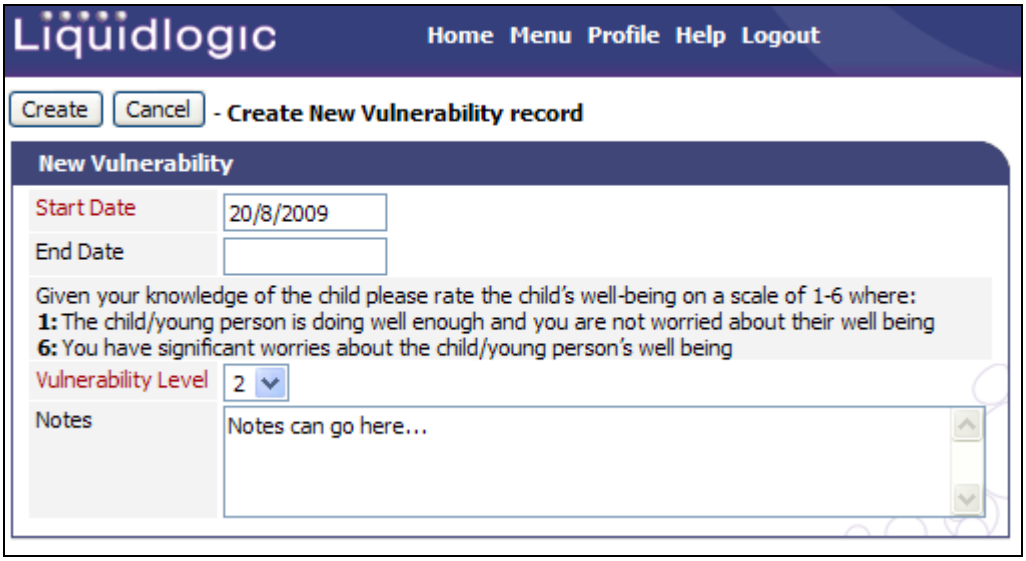


Updating the Vulnerability Level

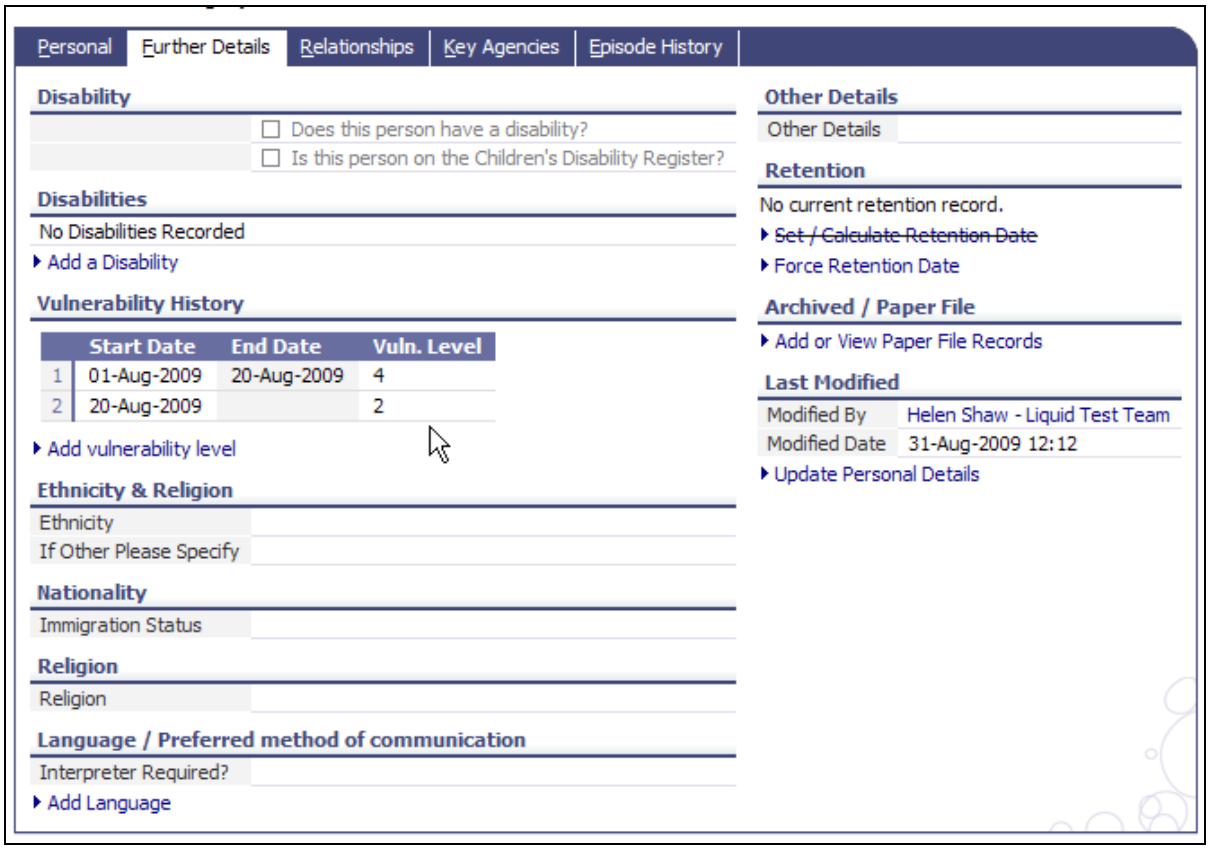
1. From the **Further Details** tab click **Add Vulnerability Level**



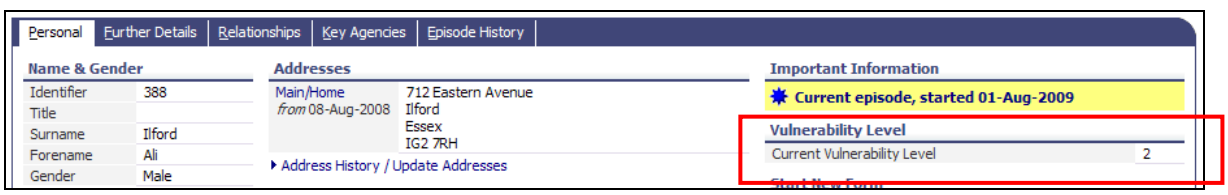
2. Enter a **start** date and select the **Vulnerability** from the picklist
3. Enter notes if required and then click **Create**


Liquidlogic
Home Menu Profile Help Logout
Create
Cancel
- Create New Vulnerability record
New Vulnerability
Start Date
20/8/2009
End Date
Given your knowledge of the child please rate the child's well-being on a scale of 1-6 where:
1: The child/young person is doing well enough and you are not worried about their well being
6: You have significant worries about the child/young person's well being
Vulnerability Level
2
Notes
Notes can go here...

The start date of the new vulnerability level will automatically be the end date of the previous vulnerability.

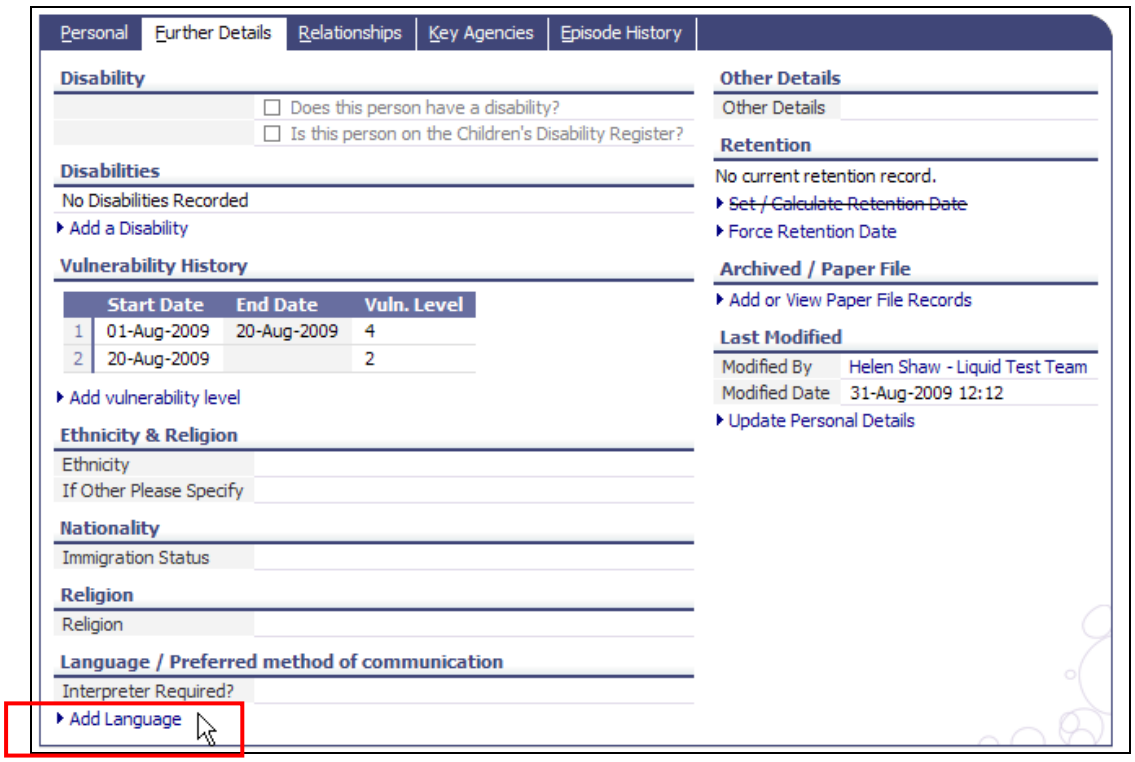


The current Vulnerability level will be displayed in the Personal tab:

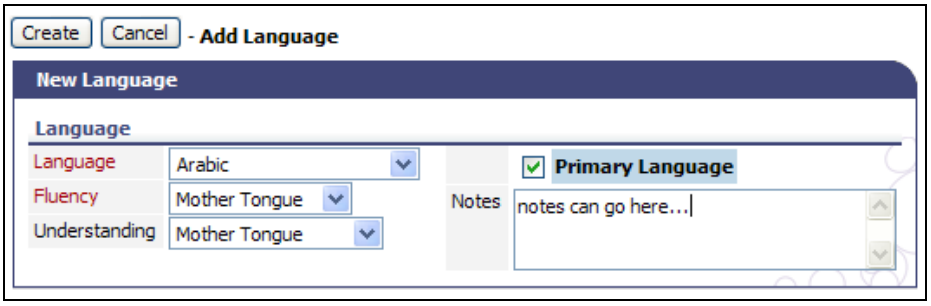


Adding a Language

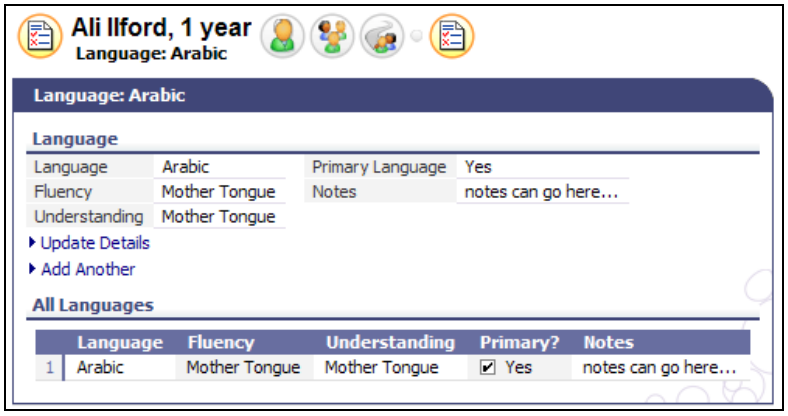
1. From the Further Details tab, click **Add Language**



2. Choose the **Language**, **Fluency** and **Understanding** from the drop-down selection lists
3. Tick the **Primary Language** checkbox, if required
4. Enter any additional **Notes** and then click **Create**

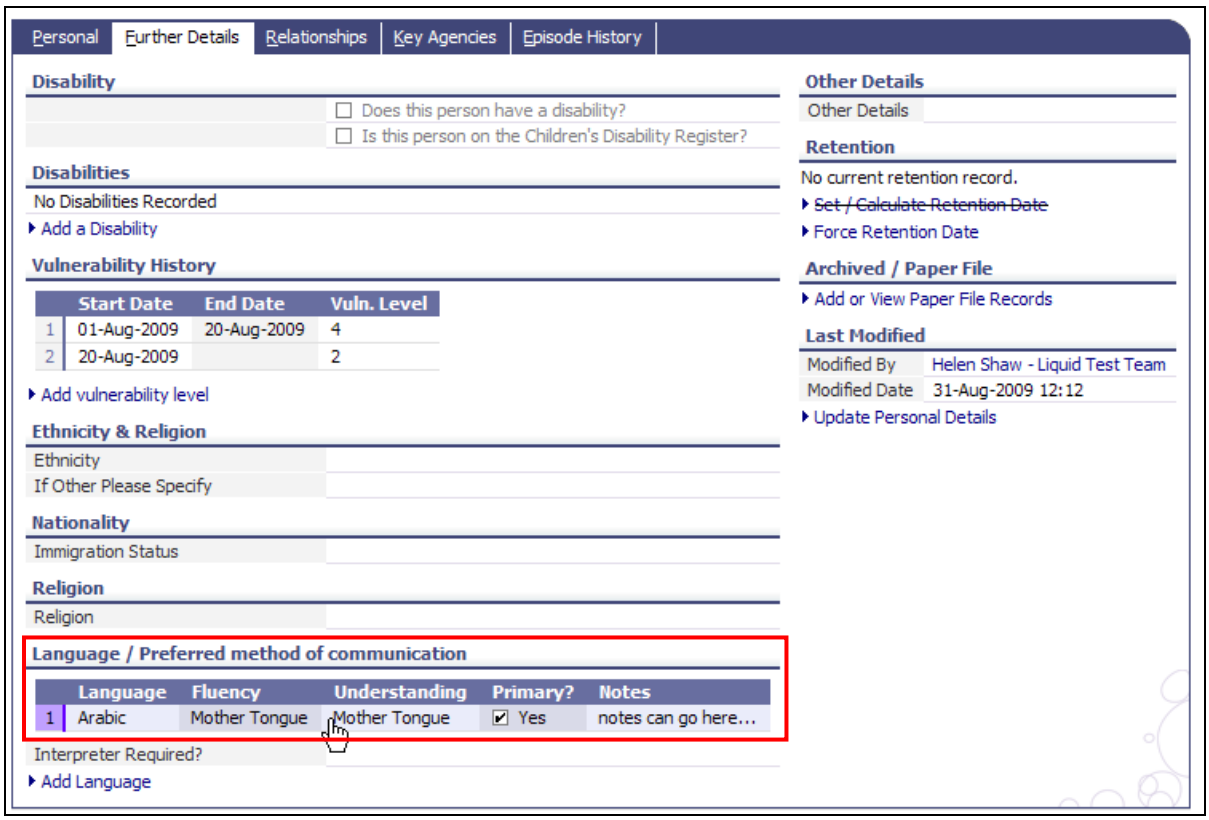


5. Click **Add Another** to continue to add further languages or select the icon to view the Further Details tab on the child's demographics record.

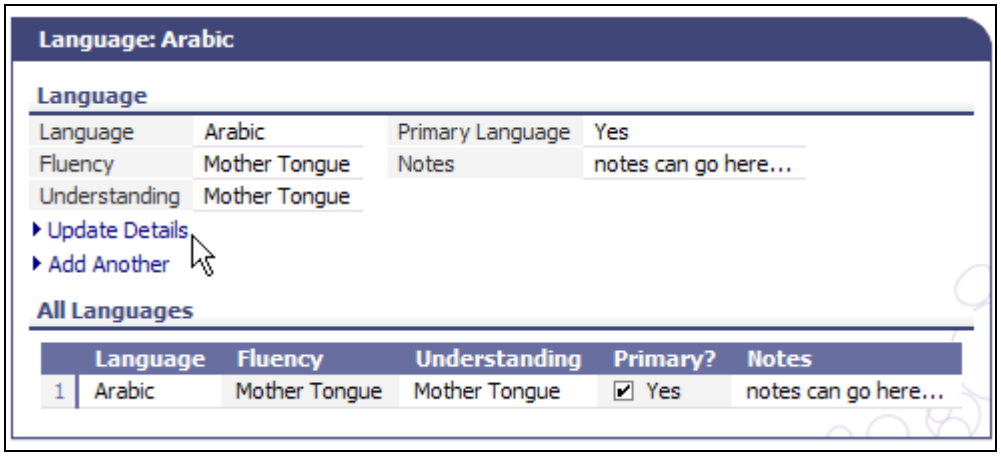


Updating Language Details

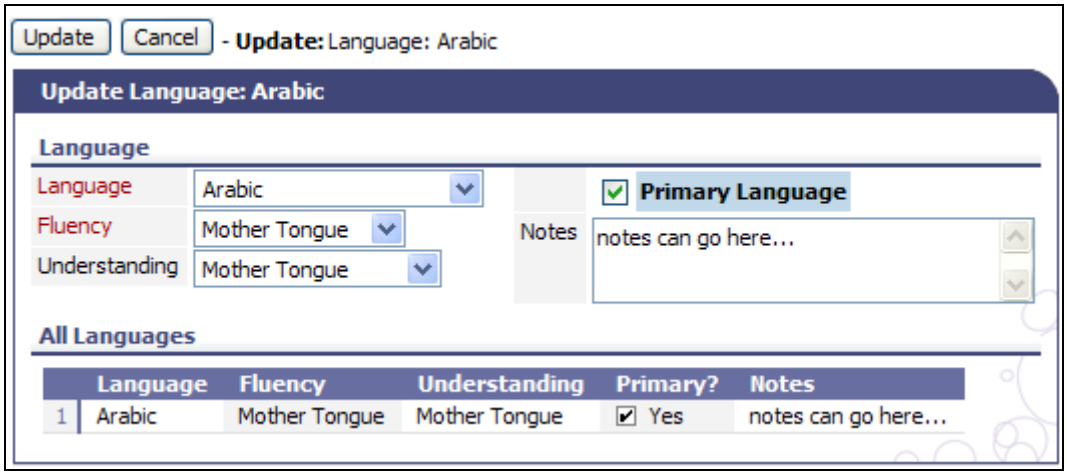
1. From the Further Details tab, click on the language that requires updating



2. Click **Update Details**

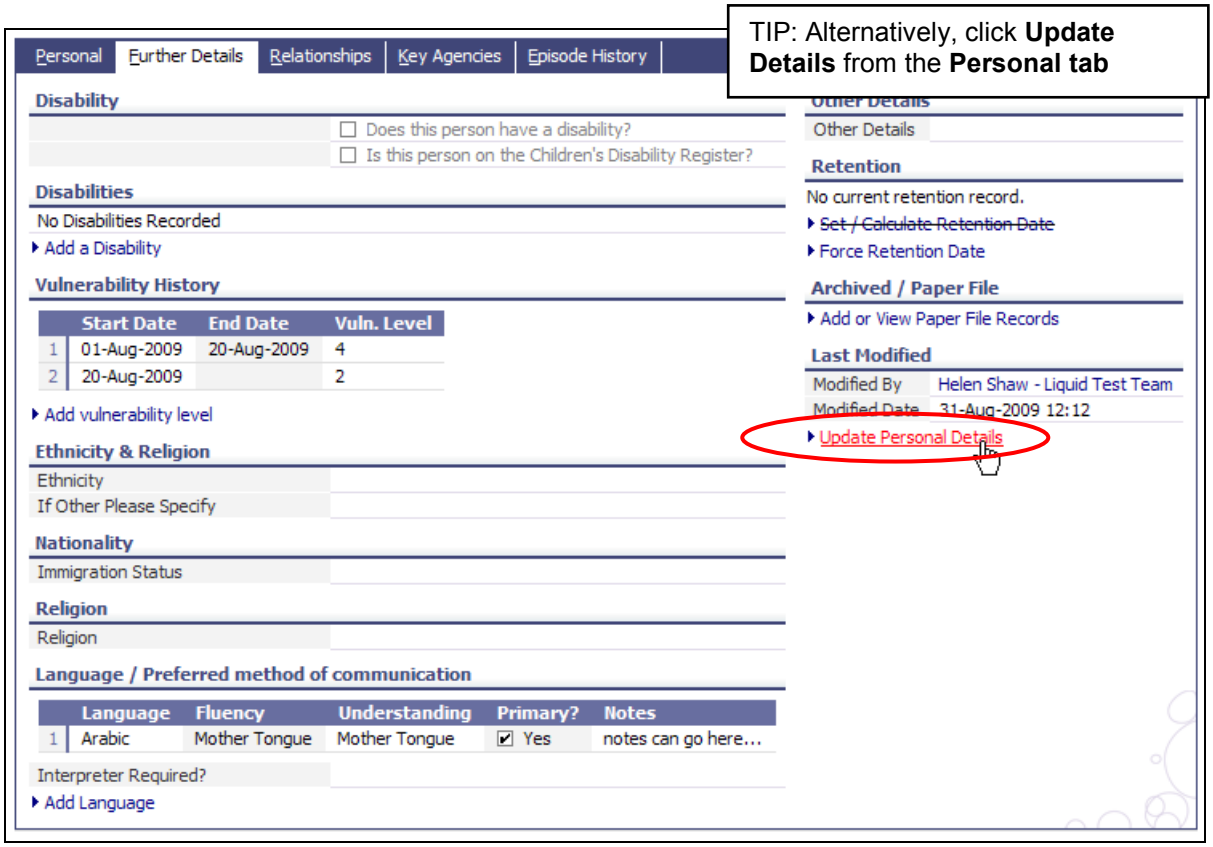


3. Make the required changes, then select **Update**

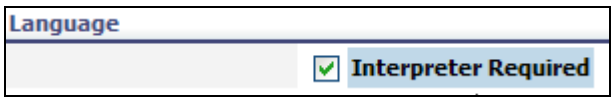


Recording that an Interpreter is required

1. From the **Further Details** tab click **Update Personal Details**

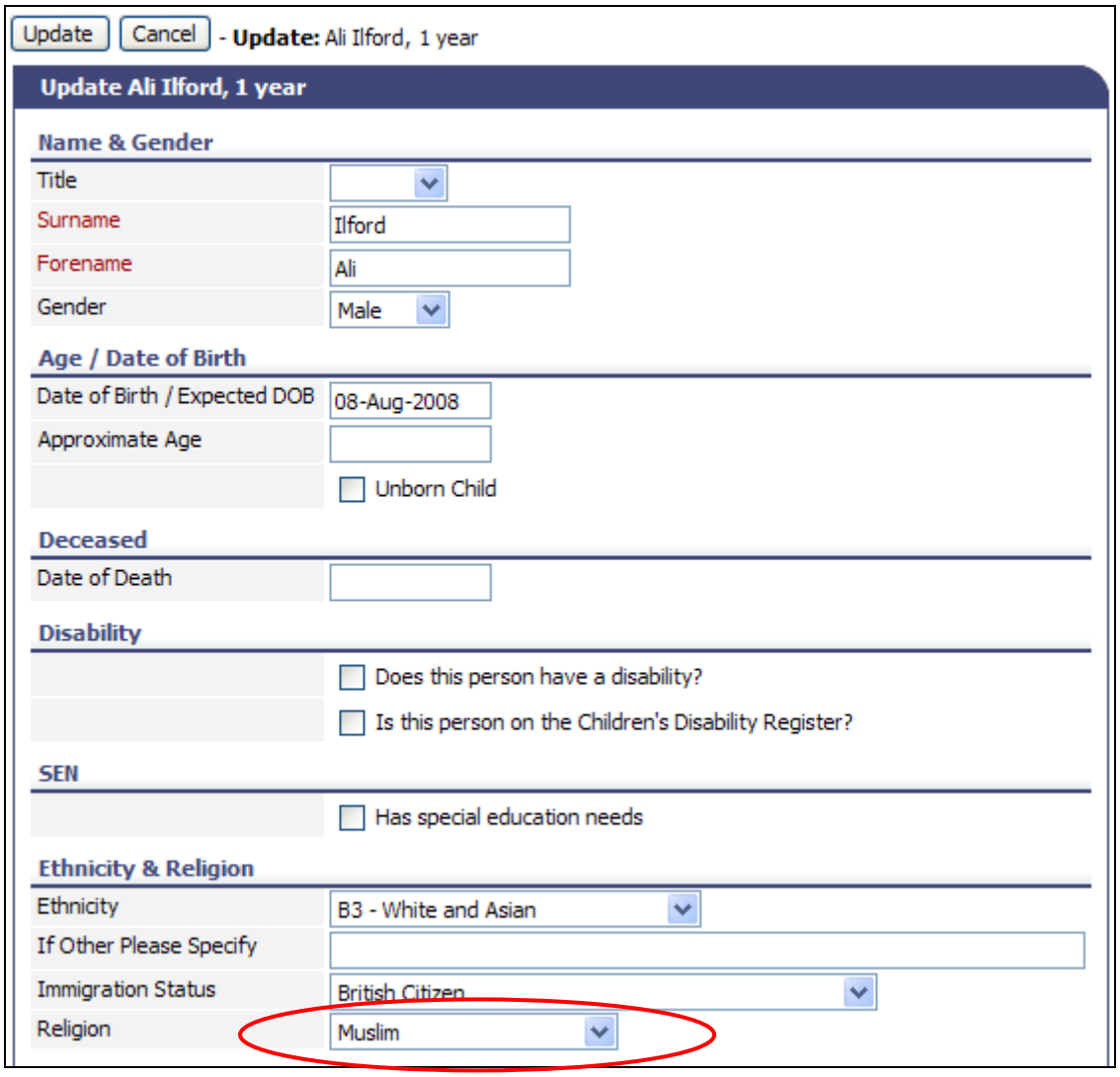


2. Click the **Interpreter Required** checkbox, then click **Update**



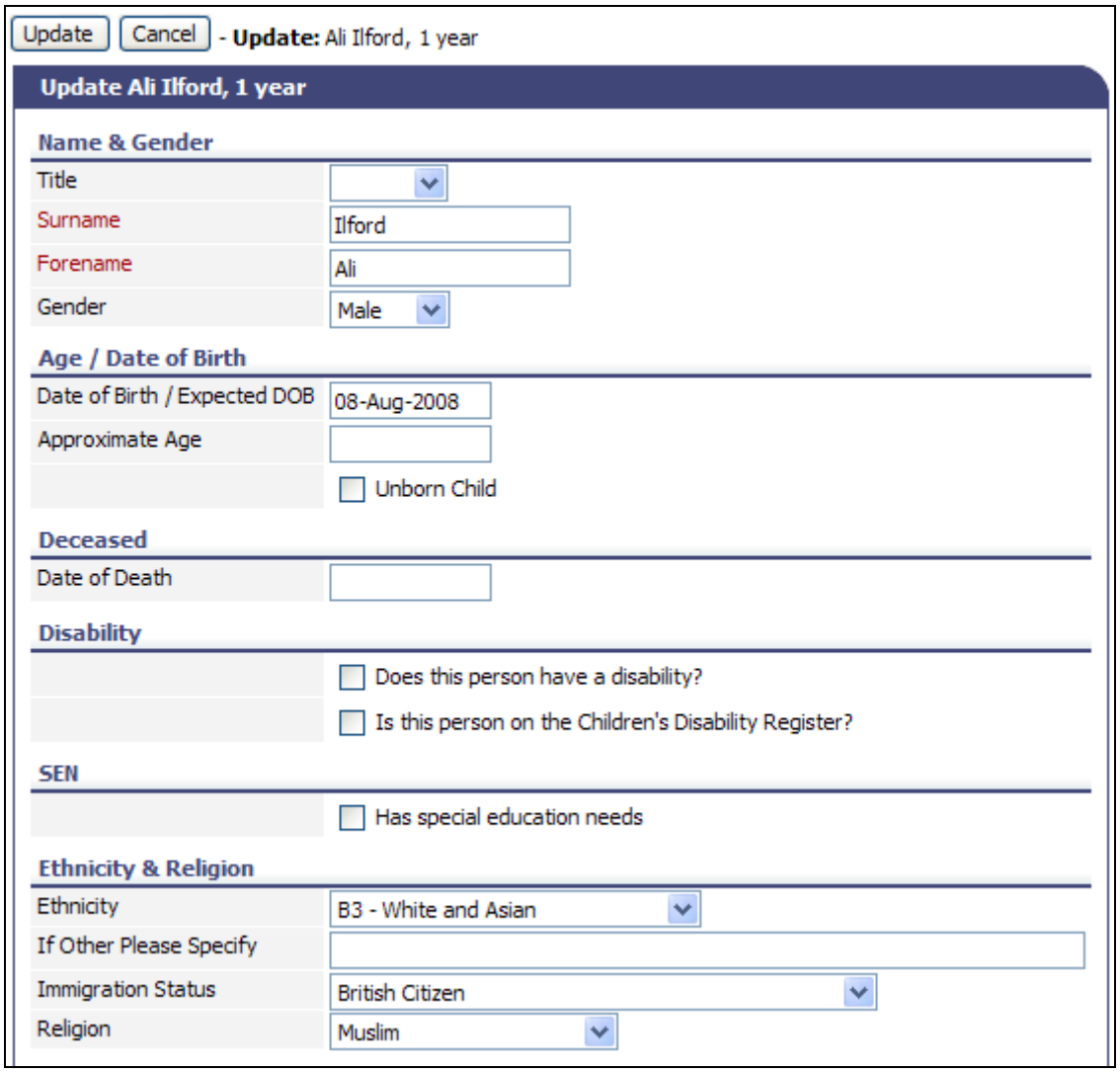
Updating the Religion

1. From the **Further Details** tab click **Update Personal Details**
2. Specify the **Religion** from the drop-down selection
3. Click **Update**



Updating the Ethnicity and Immigration Status

1. From the **Further Details** tab click **Update Personal Details**
2. Choose the **Ethnicity** from the drop-down selection
3. Enter the **Immigration Status** from the drop-down selection
4. Click **Update**

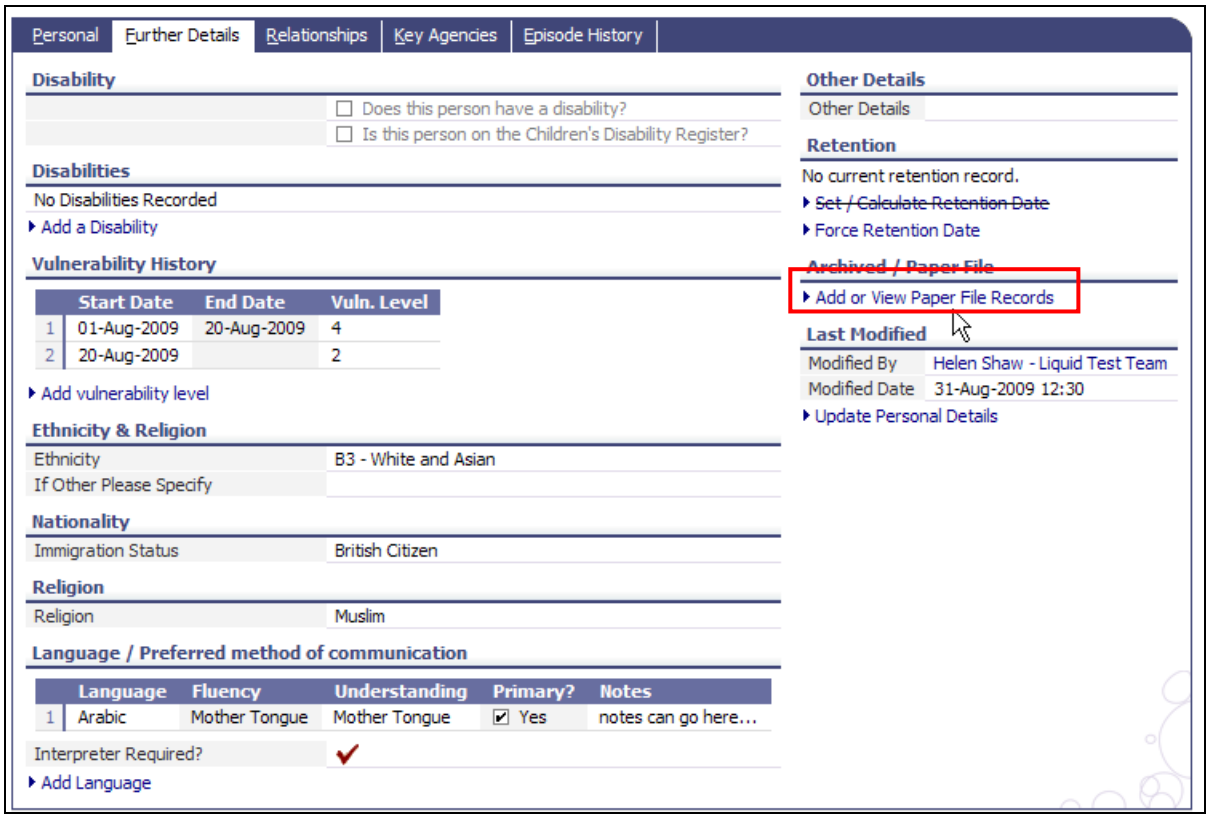


Archived/Paper File

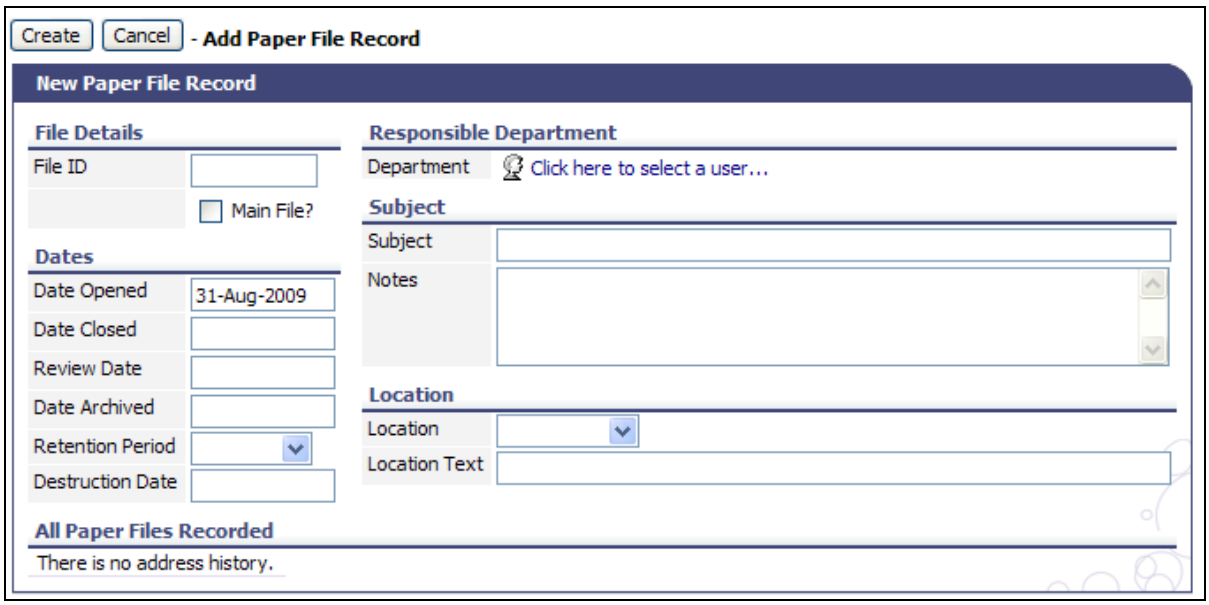
The **Archived/Paper File** section of the **Further Details** tab can hold information on the physical location of any paper files held for this child.

Adding a Paper File Record

1. Click **Add or View Paper File Records** to record information about a paper file



2. Enter the relevant information into the fields provided
3. Click the link **Click here to select a user** to select from the Address Book who is responsible for the document(s). Please see the section on My Contacts in the eCAF General user manual for further information if needed
4. Click **Create** to add a paper file record



Updating Archived/Paper File Records

1. From the Further Details tab, select **Add or View Paper File Records**
2. Select the record and click **Update Record**

3. Make the necessary changes, and then click **Update**
4. Click the demographics icon to return to the child's demographics record

Modification Information

Under the **Last Modified** section there will be some audit information detailing when the child's personal information has been updated.

Relationships

The Relationships tab is where a child/young person record can be linked to other people on the eCAF system and the relationships specified.

Liquidlogic
Home Menu Profile Help Logout
James Kirk, Age 10 years
Basic Demographics
Personal Further Details Relationships Key Agencies Episode History
Personal Relationships
Relationship Relation Age Start Comments
1 Mother Mrs Belinda Kirk 38 years 09-Feb-2008
2 Father Roger Kirk 09-Feb-2008
3 Step-Brother Kyle Clarkson 2 years 09-Feb-2008 Biological father unknown
4 Brother Jean Luc Pickard 9 years 01-Jan-2008
New Relationship

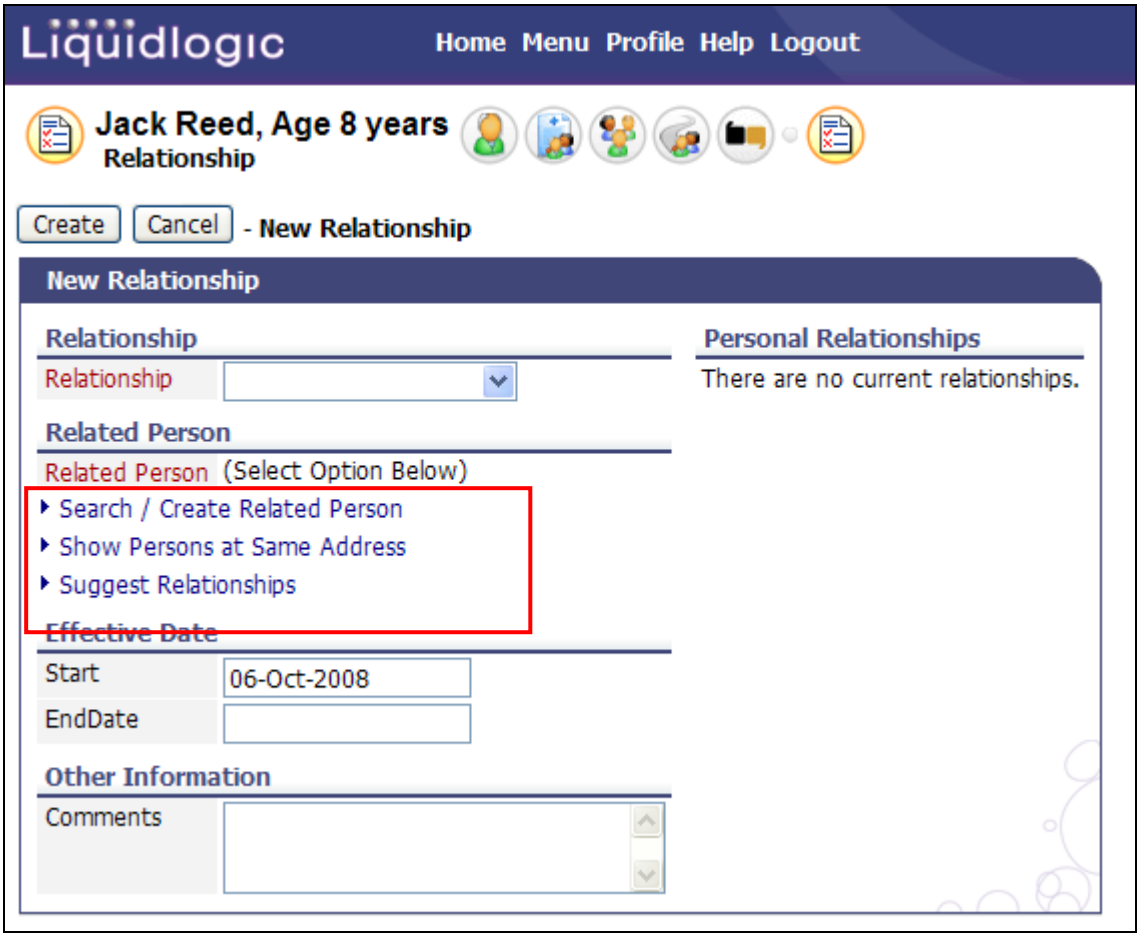
If there are no relationships currently defined for this child the relationships tab will reflect this.

New Relationships – Search / Create Related Person

1. To create new relationships select **New Relationship** from the Relationships tab

When creating/updating an individual's relationships there are 3 options:

- **Search / Create Related Person** – Allows the user to search the system for any other family members, if not found the user can then create a new person record on the system
- **Search Persons at same Address** – Returns a list of people with the same address as the child, and can then be chosen to be added as a relationship on the child's record
- **Suggest Relationships** – The suggest option will look at all of the relatives that have been set up against the selected child and look at their respective relationships. Any possible relationships will then be suggested for this child
-



2. Choose the relevant **Relationship** type from the drop down selection
3. Click **Search / Create Related Person**
4. Use the Query tab to Search for and select the required individual (See the ECAF General User Manual for further details on Searching)

The individual chosen will populate the **Related Person** field

5. If required, Enter **Comments** regarding the relationship within the free text box available
6. Click **Create** to add this person to the child's relationship tab on the demographics

New Relationships – Create Related Person

If a search has been conducted and no results have been found, you can create a new person on the system.

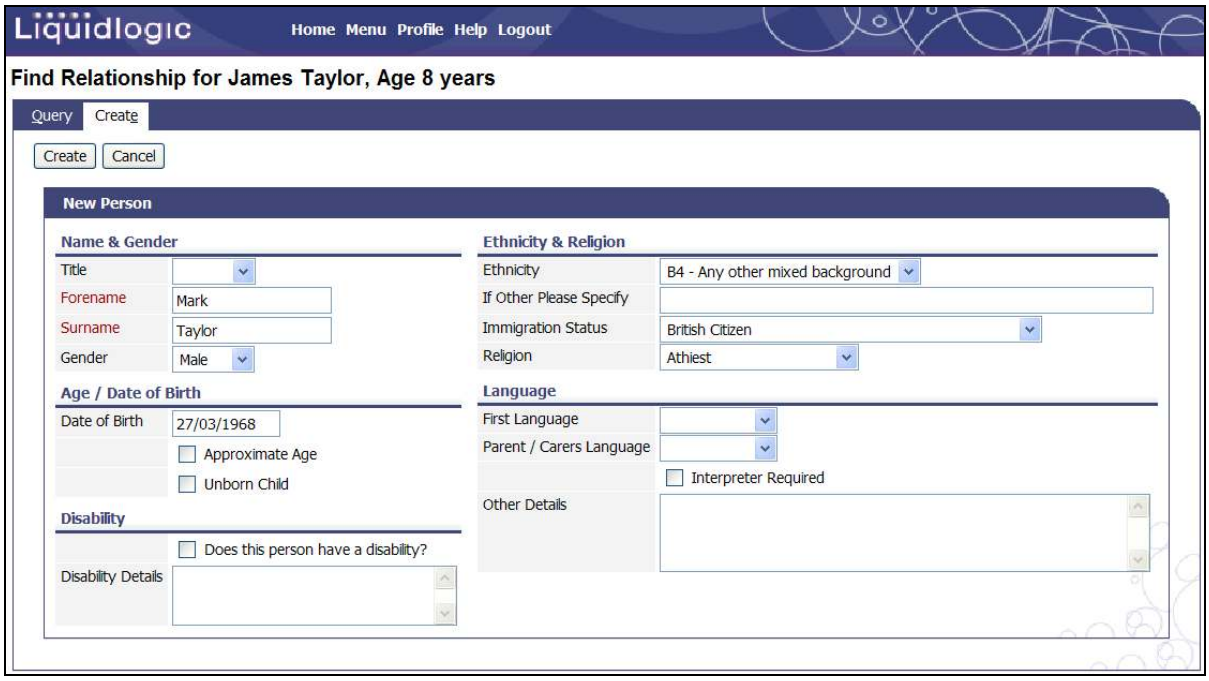
1. To create new relationships select **New Relationship** from the Relationships tab

2. Choose the relevant **relationship** type from the drop down selection
3. Click **Search / Create Related Person**
4. Use the Query tab to Search for required individual (See the ECAF General Manual for further details on Searching)
5. If no results are returned, change your search criteria and search again

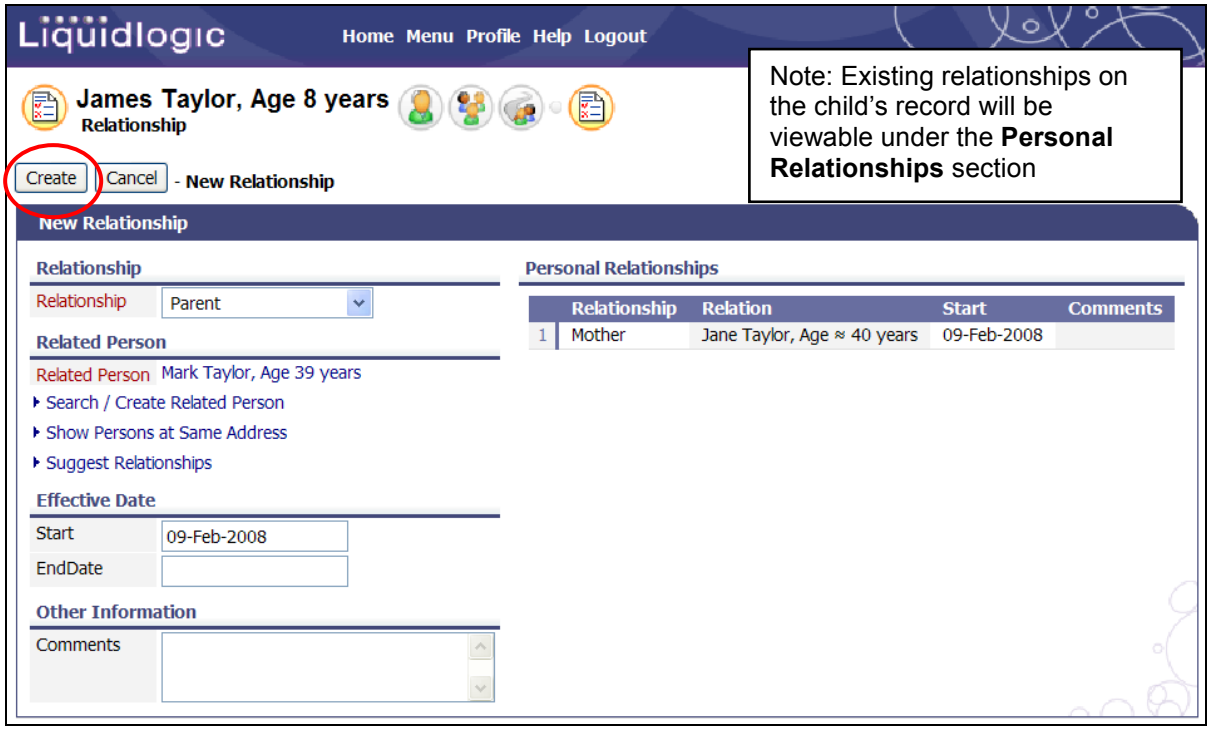
Please Note: Ensure you have exhausted all possible search options based on the information known on the individual before creating a new person record on the system.

6. Click **Create**

7. Enter the **Surname, Forename, Gender, Date of Birth** or **Approximate** Date Of Birth and any other information known e.g. Ethnicity, Religion, Disability etc
8. Click **Create** (See the ECAF **General** Manual for further guidance on creating person records.)



9. Click **Create** to add this person to the child's relationship tab



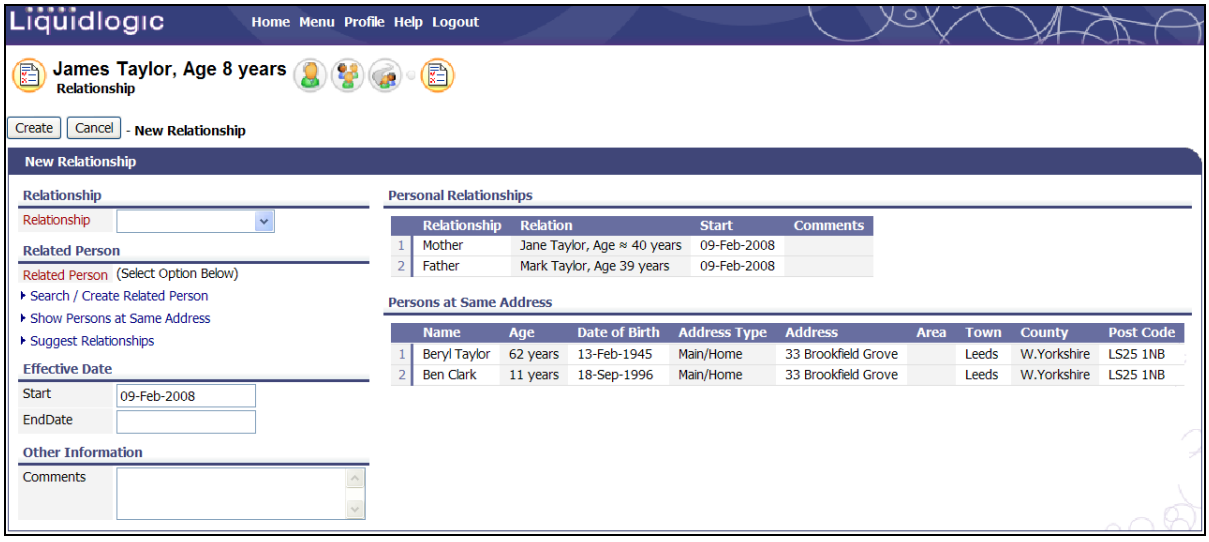
New Relationships – Show Persons at Same Address

A user is given the option search for individuals at the same address as the person the relationships are to be created on.

Please Note: Only individuals with a person record on ECAF will be shown if an exact match to the address exists. If an individual is known to have the same address but is not shown then the **Search/Create Related Person** and/or **Suggest Relationships** option should be used to create the relationship.

1. To create new relationships select **New Relationship** from the Relationships tab

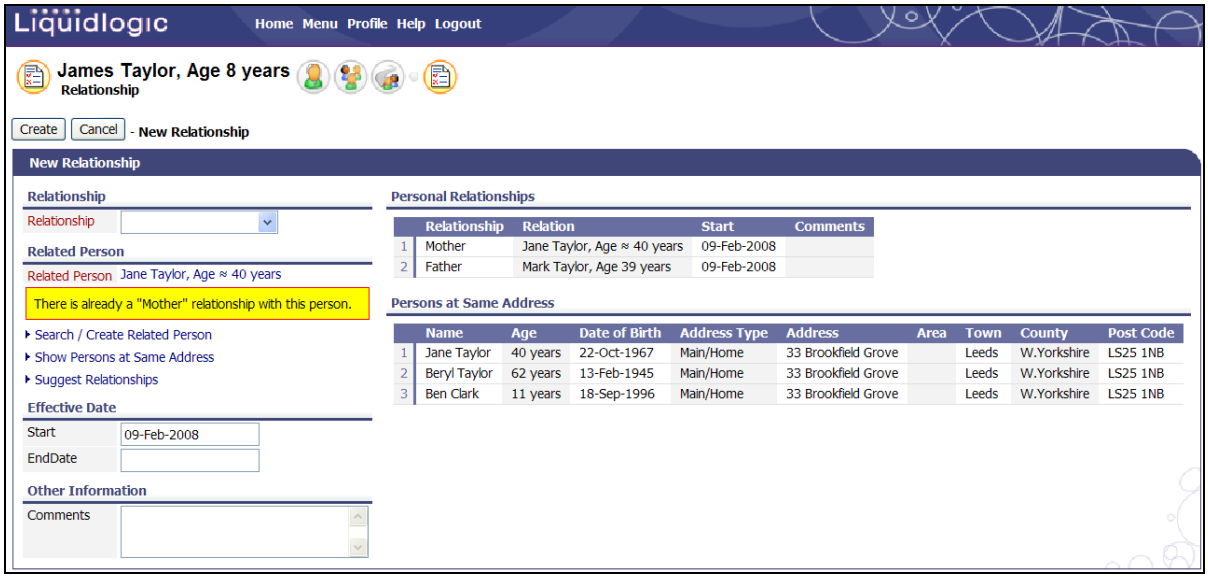
2. Choose the relevant **relationship** type from the drop down selection
3. Click **Show Persons at Same Address**


Liquidlogic
Home Menu Profile Help Logout
James Taylor, Age 8 years
Relationship
Create
Cancel
- New Relationship
New Relationship
Relationship
Relationship
Related Person
Related Person (Select Option Below)
Search / Create Related Person
Show Persons at Same Address
Suggest Relationships
Effective Date
Start 09-Feb-2008
EndDate
Other Information
Comments
Personal Relationships
Relationship Relation Start Comments
1 Mother Jane Taylor, Age ≈ 40 years 09-Feb-2008
2 Father Mark Taylor, Age 39 years 09-Feb-2008
Persons at Same Address
Name Age Date of Birth Address Type Address Area Town County Post Code
1 Beryl Taylor 62 years 13-Feb-1945 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB
2 Ben Clark 11 years 18-Sep-1996 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB

In this example both Beryl Taylor and Ben Clark are shown because they have the same address as James Taylor (33 Brookfield Grove).

4. Select the person, from the **Persons at Same Address** section

Please Note: If multiple people are shown to have the same address each person would need to be selected in turn to be added as a New Relationship on the current record. In some cases, if choosing a person at the same address whom already has an existing relationship on the current record then the following validation message will appear.



5. The **Related Person** field will be populated, Click **Create** to add the New Relationship

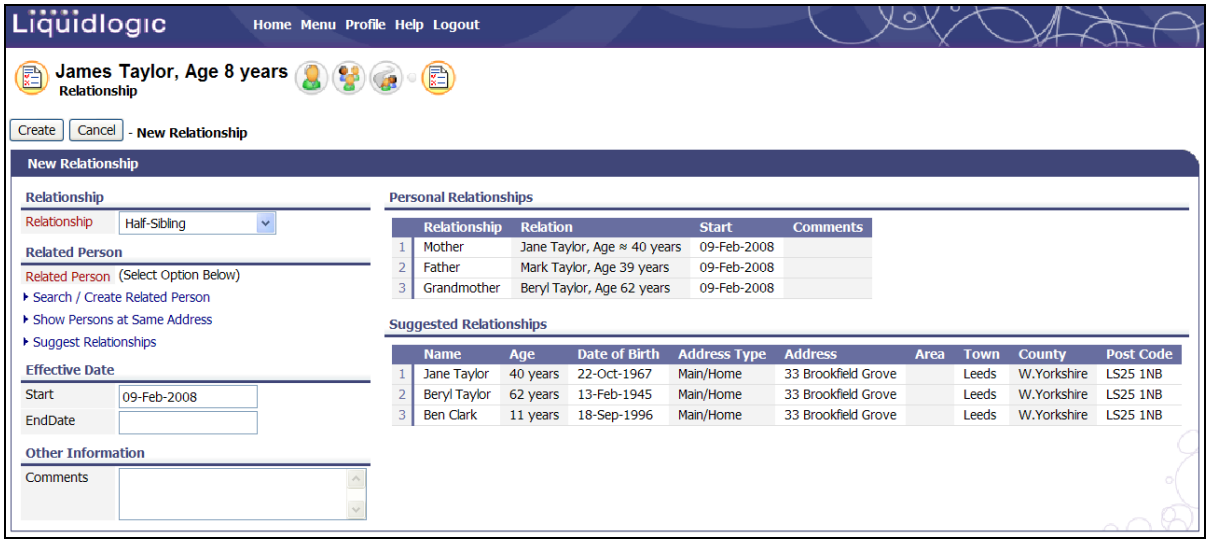
6. If multiple people are shown to have the same address and need to be added as a New Relationship on the current record then repeat steps 1 to 5 in this section.

New Relationships – Suggest Relationships

The Suggest Relationships option lists any individuals that may have a relationship to the selected person, for example, they may live at the same address or currently have a relationship with another user which this person is related to.

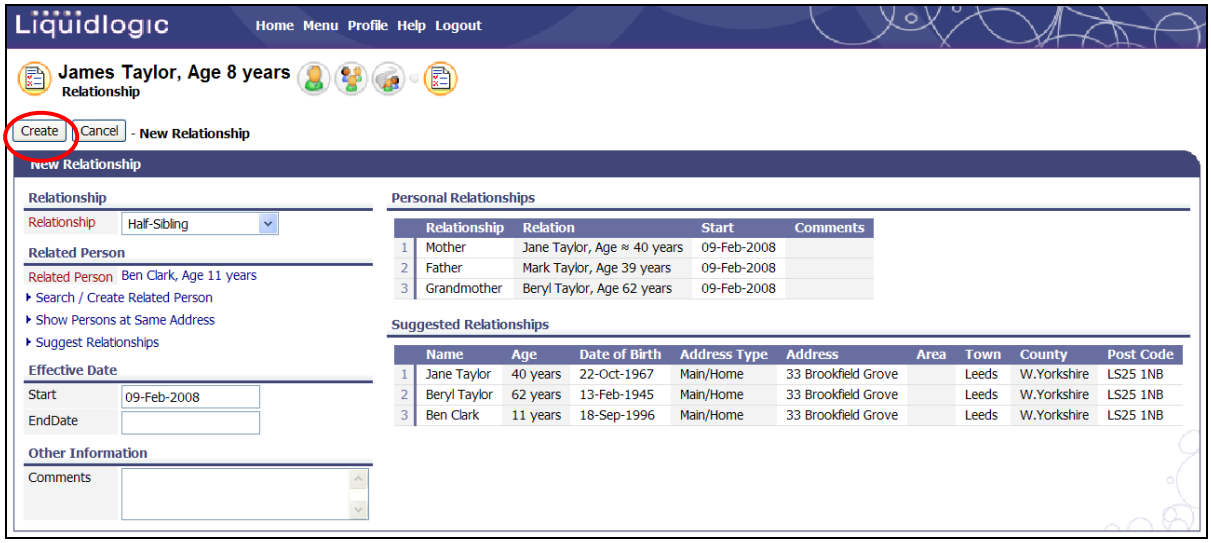
1. To create new relationships select **New Relationship** from the Relationships tab
2. Click **Suggest Relationships**

In this example Ben Clark has been suggested as a relationship as he is Jane Taylor's son from a previous marriage and also has the same address as James Taylor. Therefore a relationship type of Half-Sibling could be created between James Taylor and Ben Clark


Liquidlogic
Home Menu Profile Help Logout
James Taylor, Age 8 years
Relationship
Create Cancel - New Relationship
New Relationship
Relationship
Relationship Half-Sibling
Related Person
Related Person (Select Option Below)
Search / Create Related Person
Show Persons at Same Address
Suggest Relationships
Effective Date
Start 09-Feb-2008
EndDate
Other Information
Comments
Personal Relationships
Relationship Relation Start Comments
1 Mother Jane Taylor, Age ≈ 40 years 09-Feb-2008
2 Father Mark Taylor, Age 39 years 09-Feb-2008
3 Grandmother Beryl Taylor, Age 62 years 09-Feb-2008
Suggested Relationships
Name Age Date of Birth Address Type Address Area Town County Post Code
1 Jane Taylor 40 years 22-Oct-1967 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB
2 Beryl Taylor 62 years 13-Feb-1945 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB
3 Ben Clark 11 years 18-Sep-1996 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB

If the suggested relationship does not need to be added to the current person record then Click **Cancel**.

3. To select any of the suggested relationships click on the appropriate suggested relationship
4. The **Related Person** field will populate**,** then choose the **Relationship** type from the drop down selection


Liquidlogic
Home Menu Profile Help Logout
James Taylor, Age 8 years
Relationship
Create Cancel - New Relationship
New Relationship
Relationship
Relationship Half-Sibling
Related Person
Related Person Ben Clark, Age 11 years
Search / Create Related Person
Show Persons at Same Address
Suggest Relationships
Effective Date
Start 09-Feb-2008
EndDate
Other Information
Comments
Personal Relationships
Relationship Relation Start Comments
1 Mother Jane Taylor, Age ≈ 40 years 09-Feb-2008
2 Father Mark Taylor, Age 39 years 09-Feb-2008
3 Grandmother Beryl Taylor, Age 62 years 09-Feb-2008
Suggested Relationships
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2 Beryl Taylor 62 years 13-Feb-1945 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB
3 Ben Clark 11 years 18-Sep-1996 Main/Home 33 Brookfield Grove Leeds W.Yorkshire LS25 1NB

5. Click **Create**

This individual will now be added as a new relationship on the demographics

Updating Relationships

1. From the individual's relationships tab, click on the necessary relationship which requires updating

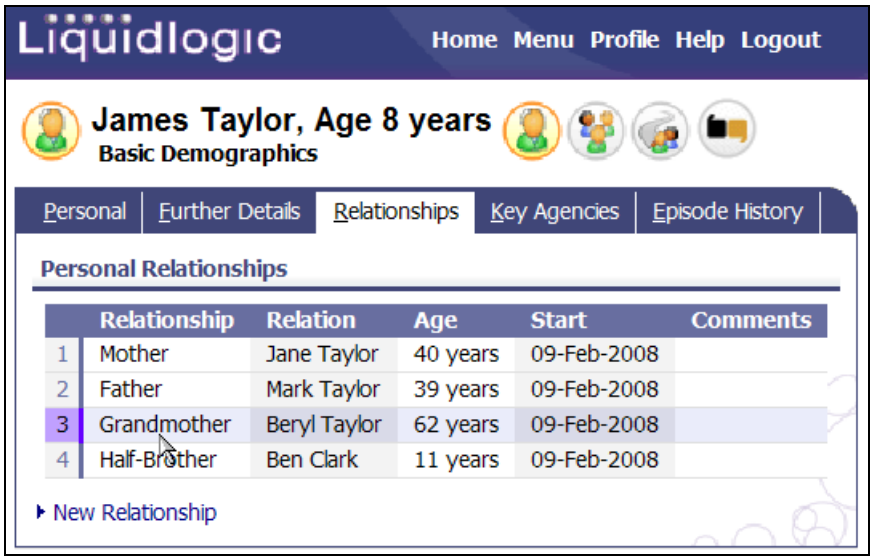
Details of the chosen relationship are displayed

2. Click **Update this Relationship**
3. Make the required changes, and then click **Update**
4. To return to the relationships tab on the demographics click on the **Demographics icon**.

View Opposite Relationships

A user can navigate from one person record to another if a relationship exists. The View Opposite Relationship option can be used.

1. From the individual's relationships tab, click on the necessary relationship to view



The existing relationship details are displayed

2. Click **View Opposite Relationship** link

The system navigates you from the original person record (in this example 'James Taylor') to the relationship's record (in this example 'Beryl Taylor')

3. To view the full demographics of the person record displayed click the **Demographics icon**.

Deleting Relationships

1. From the Relationships tab, click on the necessary relationship to end and automatically delete
2. Click **Update this Relationship**

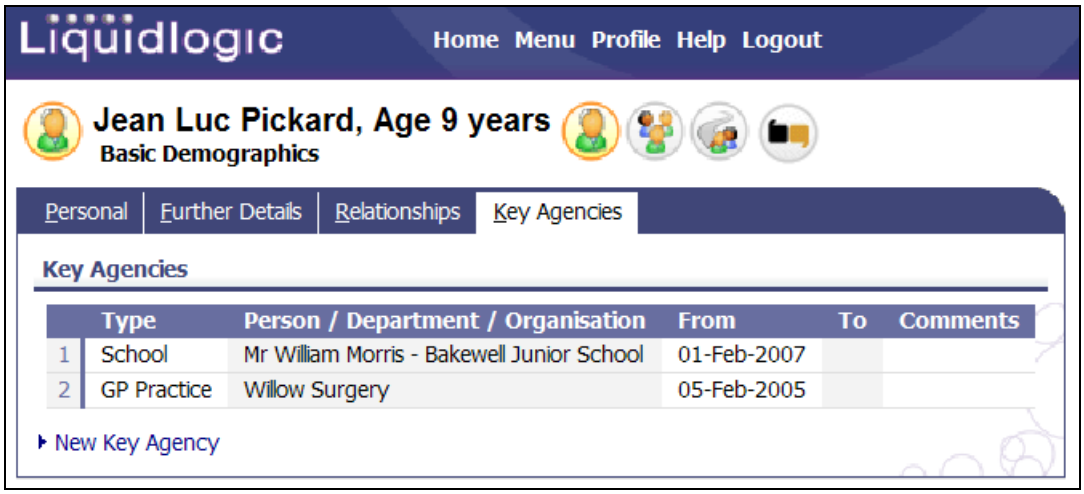
3. Enter the **End Date**, and then click **Update**
4. To return to the relationships tab on the demographics click on the **Demographics icon**.

Ended Relationships will be deleted from the Relationships tab, and will no longer be displayed on the Family Tree.

Liquidlogic
Home Menu Profile Help Logout
James Taylor, Age 8 years
Basic Demographics
Personal Further Details Relationships Key Agencies Episode History
Personal Relationships
Relationship Relation Age Start Comments
1 Mother Jane Taylor 40 years 09-Feb-2008
2 Father Mark Taylor 39 years 09-Feb-2008
3 Half-Brother Ben Clark 11 years 09-Feb-2008
New Relationship

Key Agencies

The **Key Agencies** tab holds information about any **Key Agencies** that are involved with the child.


Liquidlogic
Home Menu Profile Help Logout
Jean Luc Pickard, Age 9 years
Basic Demographics
Personal Further Details Relationships Key Agencies
Key Agencies
Type Person / Department / Organisation From To Comments
1 School Mr William Morris - Bakewell Junior School 01-Feb-2007
2 GP Practice Willow Surgery 05-Feb-2005
New Key Agency

Adding a New Key Agency

1. From the Key Agencies tab, select **New Key Agency**

Liquidlogic
Home Menu Profile Help Logout
James Taylor, Age 8 years
Basic Demographics
Personal Further Details Relationships Key Agencies Episode History
Key Agencies
There are no current key agencies.
New Key Agency

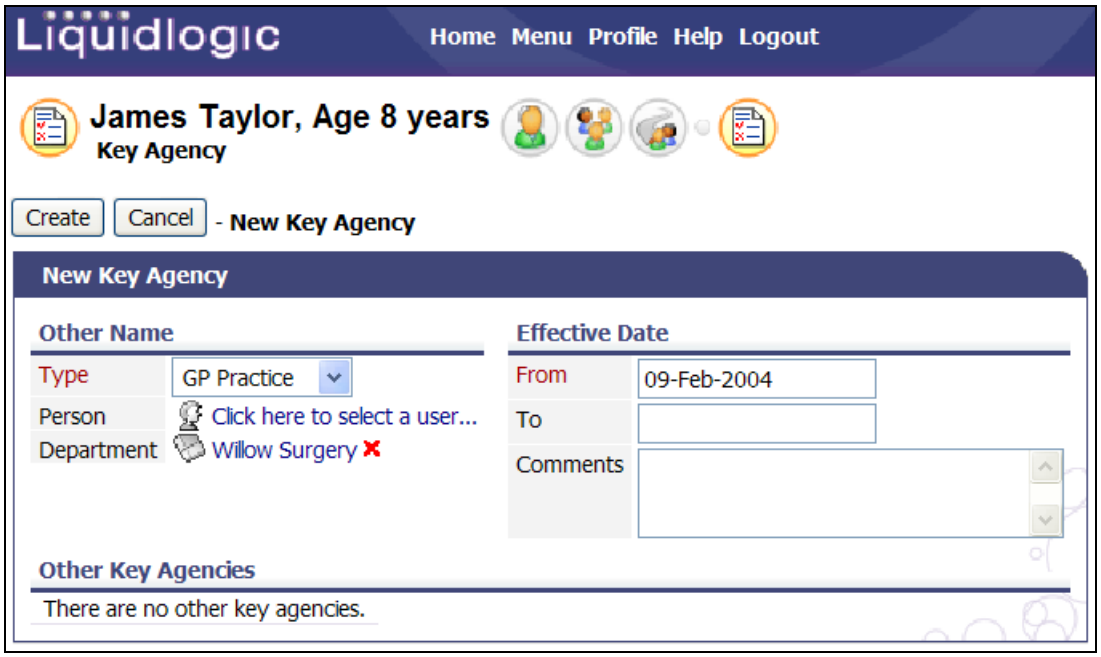
2. Choose the Key Agency **Type** from the drop down selection

3. Select the appropriate **Click here to select a user link** against either the **Person** or **Department** field

Field	Description
Person	To search for a particular person linked to a key agency e.g. Dr Ian Jones
Department	To search for a named department/organisation which is considered as a key agency e.g. Willow Surgery

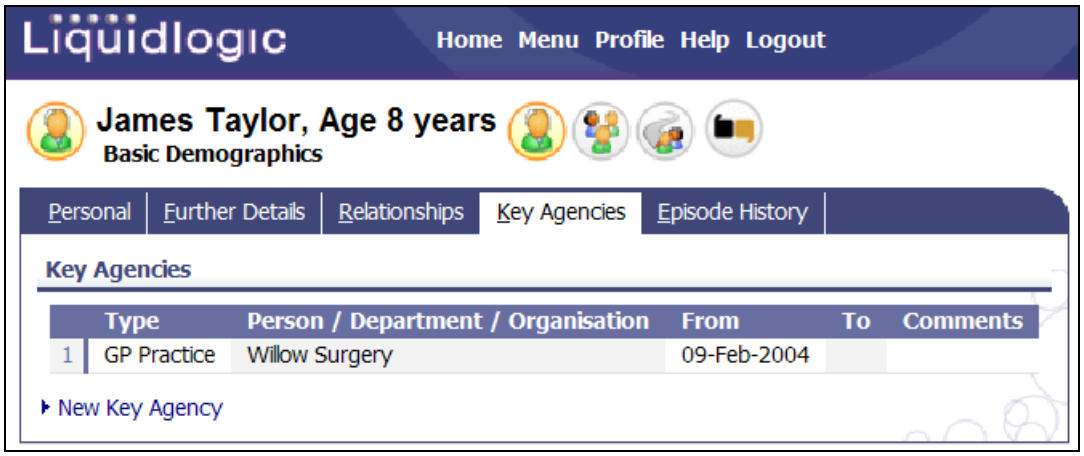
4. This will take you through to **My Contacts** where you can search for and select the key agency/person from the Address Book

For more information on using **My Contacts** and the **Address Book** please refer to the ECAF **General** Manual.



5. Enter the Effective **From** date and any other relevant comments for the Key Agency
6. Click **Create**

Added Key Agencies will now be displayed in the Key Agencies tab in the child's demographics:



Updating a Key Agency

1. From the Key Agencies tab, click on the required key agency
2. Click **Update…** to make the necessary changes

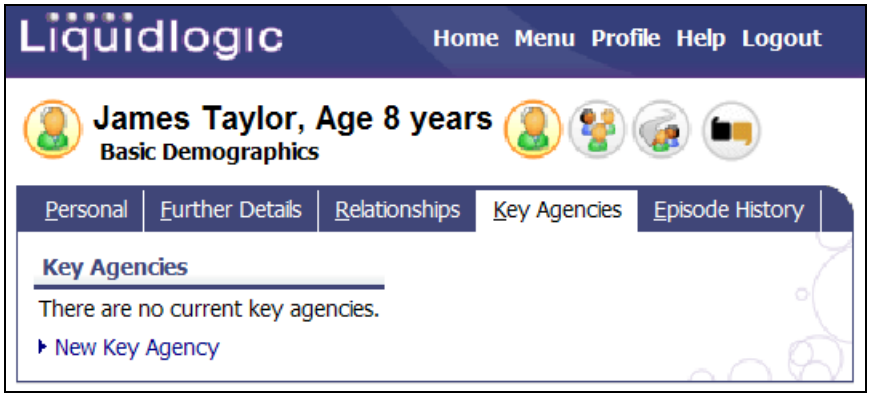
3. Make the necessary changes, and then click **Update**

Deleting a Key Agency

1. Select the Key Agencies tab, click on the necessary key agency to end and automatically delete
2. Click **Update**

3. Enter Effective **To** date
4. Click **Update**
5. Click the Demographics Icon to return to demographics record

The Key Agency will be deleted from the Key Agencies tab

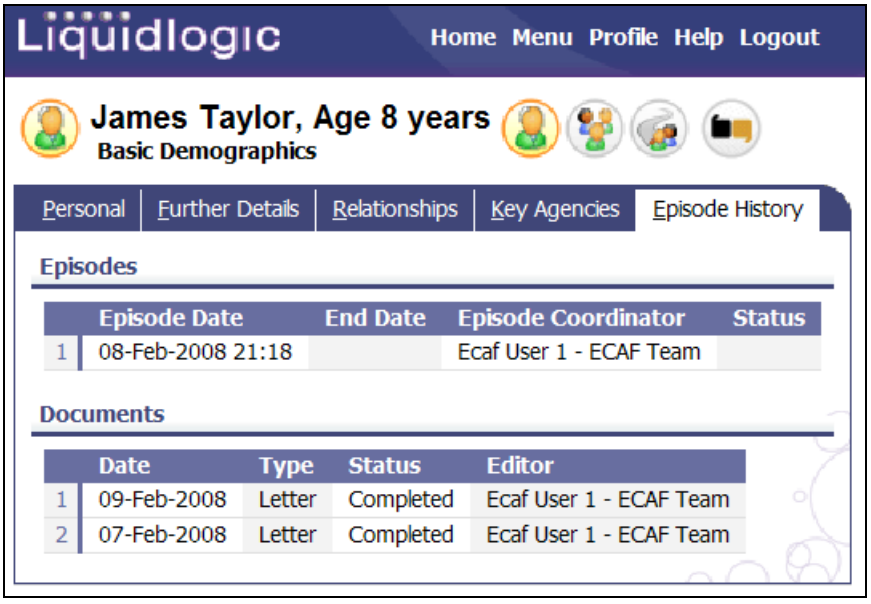


Episode History

The **Episode History** tab is automatically updated as individuals; groups or departments record ECAF episodes for the child/young person.

Important: If no previous and current eCAF episodes exist; and no electronic documents exist on the person record the Episode History tab will not be present on the demographics record.

Any documents that have been attached to the child/young person's record on Protocol eCAF are viewable from the Episode History tab. For further guidance on creating documents please refer to the **Document Editor** Manual.



Accessing the Episode Details

1. From the Episode History tab, select the episode to view the **Episode Details** tabs

NOTE: Please refer to the **Episode Details** manual for further information on these tabs.

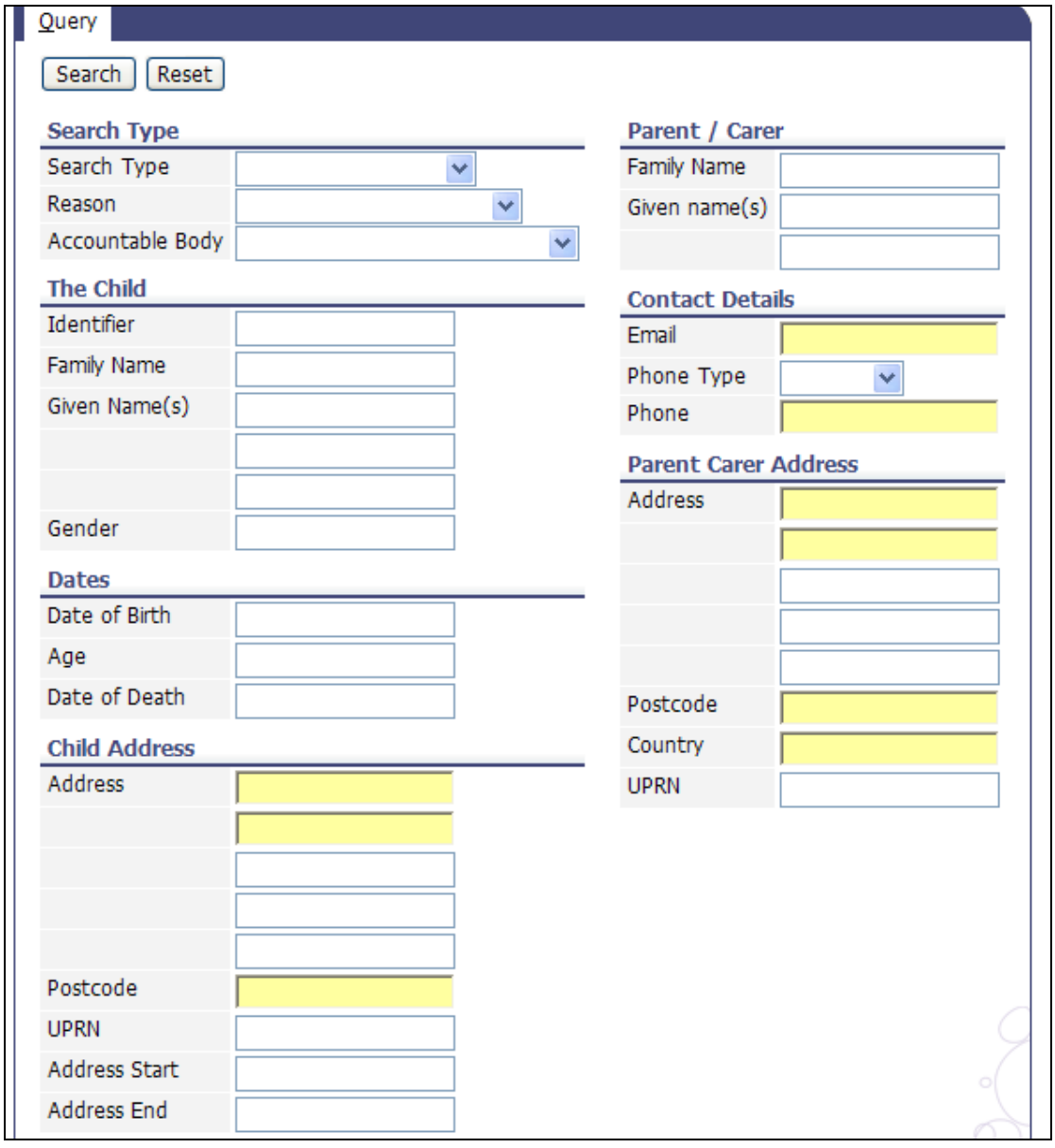
ContactPoint

NOTE: This section is only applicable to customers who will connect to ContactPoint from their Protocol eCAF system. Please consult your Liquidlogic Project Manager for further details.

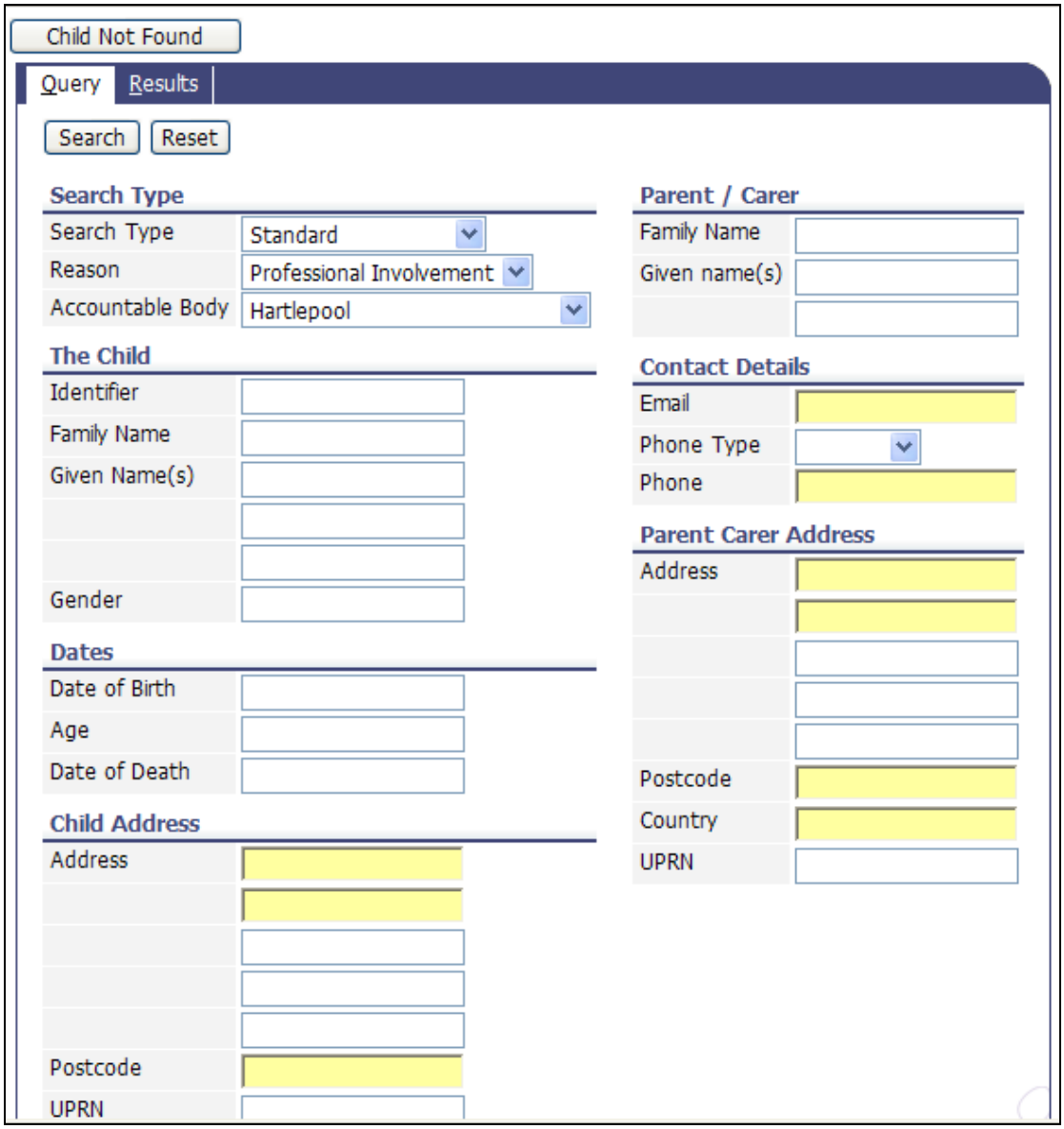
Searching ContactPoint - unlinked record from within Child's Record

1. Select the ContactPoint icon

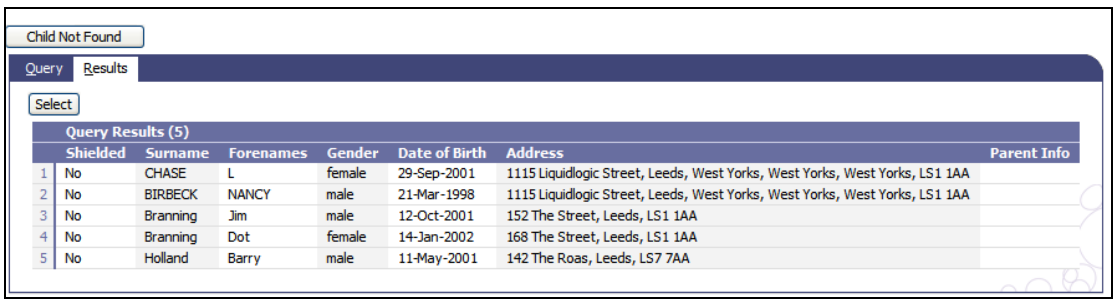
If the child/young person has not got a linked record in ContactPoint a search query window will be displayed:



1. From the search query window, select the appropriate **search type** from the picklist.
2. Select the **reason** for the search from the picklist.
3. Select the **Accountable Body**, if required from the picklist
4. Enter any other search criteria, such as name, DOB, address of child or Parent/carer, identifiers or services as required

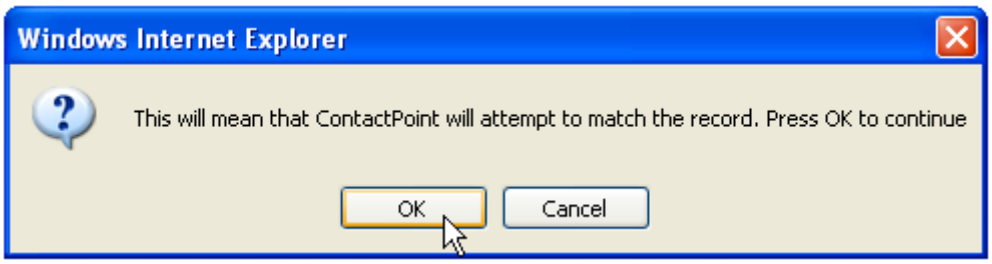


A list of results will be displayed:


Child Not Found
Query
Results
Select
Query Results (5)
Shielded
Surname
Forenames
Gender
Date of Birth
Address
Parent Info
1 No CHASE L female 29-Sep-2001 1115 Liquidlogic Street, Leeds, West Yorks, West Yorks, West Yorks, LS1 1AA
2 No BIRBECK NANCY male 21-Mar-1998 1115 Liquidlogic Street, Leeds, West Yorks, West Yorks, West Yorks, LS1 1AA
3 No Branning Jim male 12-Oct-2001 152 The Street, Leeds, LS1 1AA
4 No Branning Dot female 14-Jan-2002 168 The Street, Leeds, LS1 1AA
5 No Holland Barry male 11-May-2001 142 The Roas, Leeds, LS7 7AA

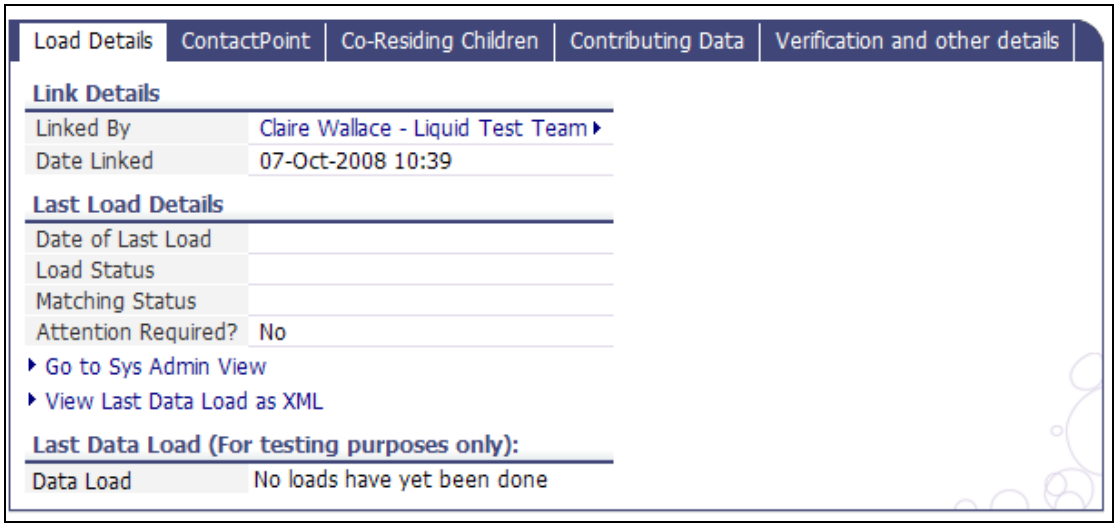
5. If one of the results matches the child/young person's record, select the result and click the Select button
6. If the required result is not listed click **Child not found**

7. After selecting child not found, click **OK** to match the record in ContactPoint


Windows Internet Explorer
This will mean that ContactPoint will attempt to match the record. Press OK to continue
OK
Cancel

ContactPoint Load Details tab

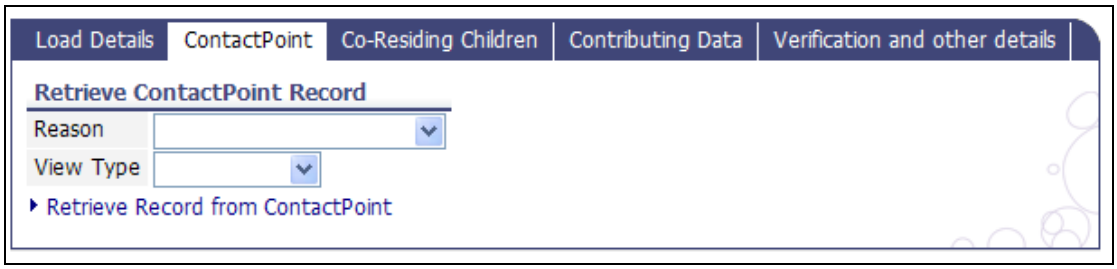
The Load Details tab lists who originally linked the ContactPoint record and when. It also includes the matching status and whether any attention is required.



ContactPoint tab

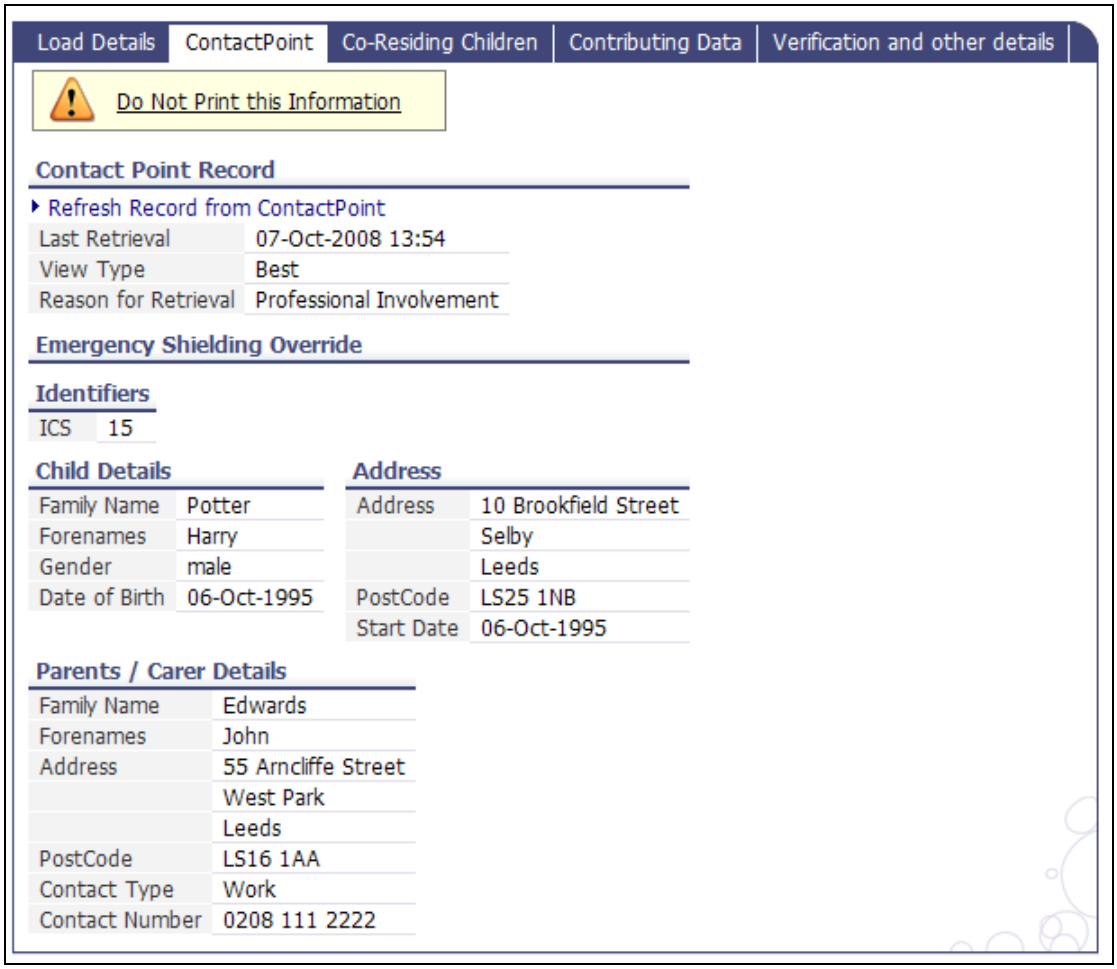
The ContactPoint tab allows the user to retrieve a record from ContactPoint

1. Select the **Reason** from the picklist from the following options:
    a. Professional Involvement
    b. Referral
    c. Initial Contact
2. Specify the **View Type**
    d. Best View
    e. Complete View
    f. Last Update View
3. Click **Retrieve Record from ContactPoint**

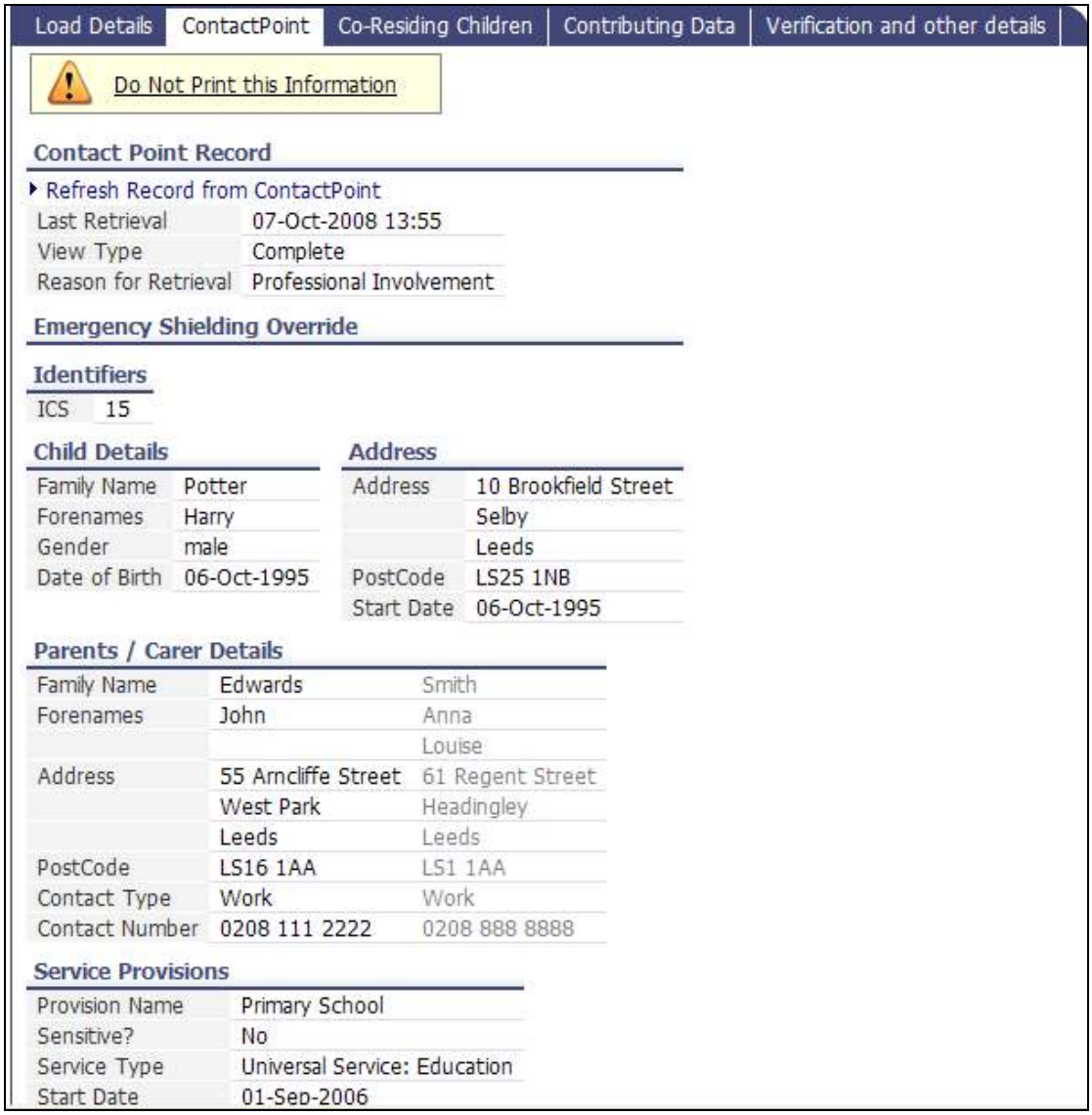


NOTE: If the login period has expired the user will be navigated back to the login screen before they are able to retrieve the record from ContactPoint. The user will need to repeat the above steps, i.e. select a reason and view type and click 'Retrieve Record from ContactPoint'.

The following is an example of **Best View** type.

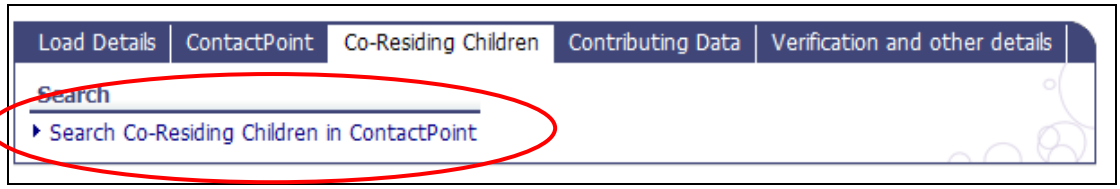


The following is an example of **Complete View** type.



Co-Residing Children

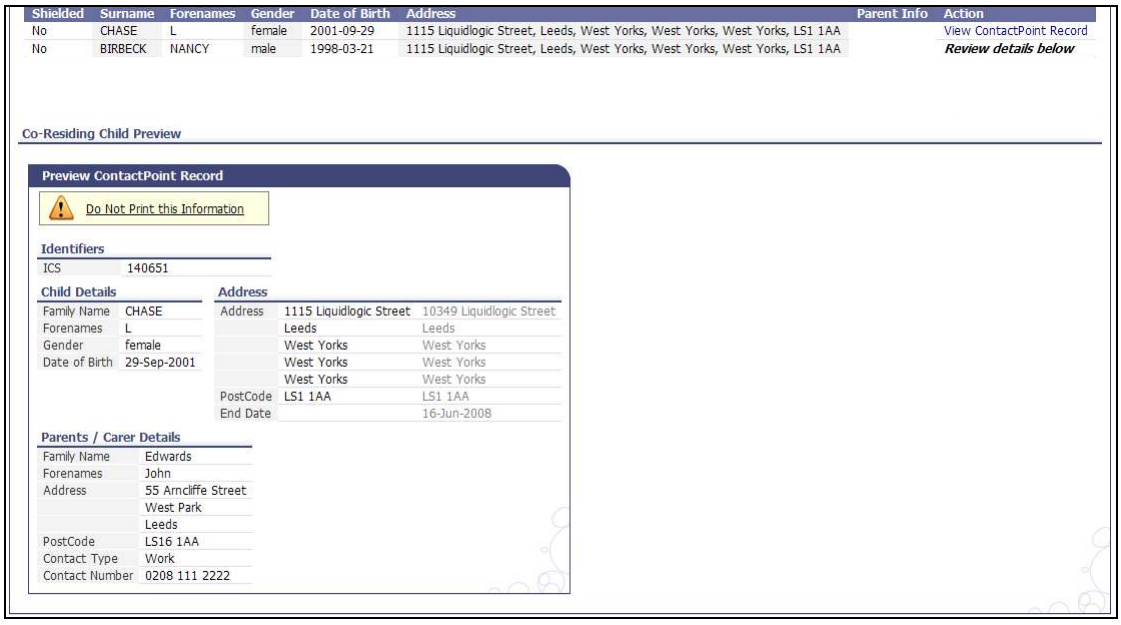
This tab will enable you to search for any co-residing children at the same address by clicking on the link below.



This would then produce a list of siblings living at the same address as shown below:

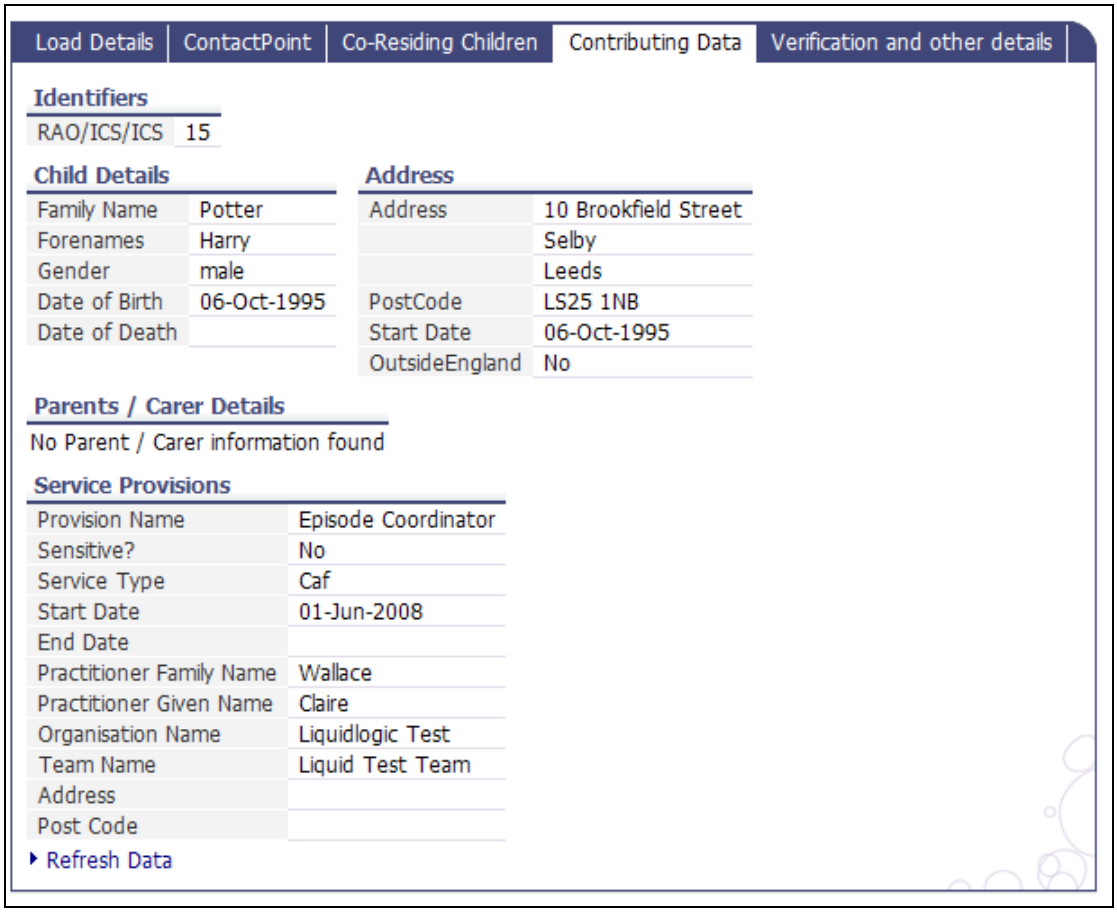
Load Details
ContactPoint
Co-Residing Children
Contributing Data
Verification and other details
Search
Search Co-Residing Children in ContactPoint
Co-Residing Children
Shielded Surname Forenames Gender Date of Birth Address Parent Info Action
No CHASE L female 2001-09-29 1115 Liquidlogic Street, Leeds, West Yorks, West Yorks, West Yorks, LS1 1AA View ContactPoint Record
No BIRBECK NANCY male 1998-03-21 1115 Liquidlogic Street, Leeds, West Yorks, West Yorks, West Yorks, LS1 1AA View ContactPoint Record

Clicking on the **View ContactPoint Record** link will give you a brief summary of the other siblings record as shown below.


Shielded Surname Forenames Gender Date of Birth Address Parent Info Action
No CHASE L female 2001-09-29 1115 Liquidlogic Street, Leeds, West Yorks, West Yorks, West Yorks, LS1 1AA View ContactPoint Record
No BIRBECK NANCY male 1998-03-21 1115 Liquidlogic Street, Leeds, West Yorks, West Yorks, West Yorks, LS1 1AA Review details below
Co-Residing Child Preview
Preview ContactPoint Record
Do Not Print this Information
Identifiers
ICS 140651
Child Details
Family Name CHASE
Forenames L
Gender female
Date of Birth 29-Sep-2001
Address
Address 1115 Liquidlogic Street 10349 Liquidlogic Street
Leeds Leeds
West Yorks West Yorks
West Yorks West Yorks
West Yorks West Yorks
PostCode LS1 1AA LS1 1AA
End Date 16-Jun-2008
Parents / Carer Details
Family Name Edwards
Forenames John
Address 55 Arncliffe Street
West Park
Leeds
PostCode LS16 1AA
Contact Type Work
Contact Number 0208 111 2222

Contributing Data tab

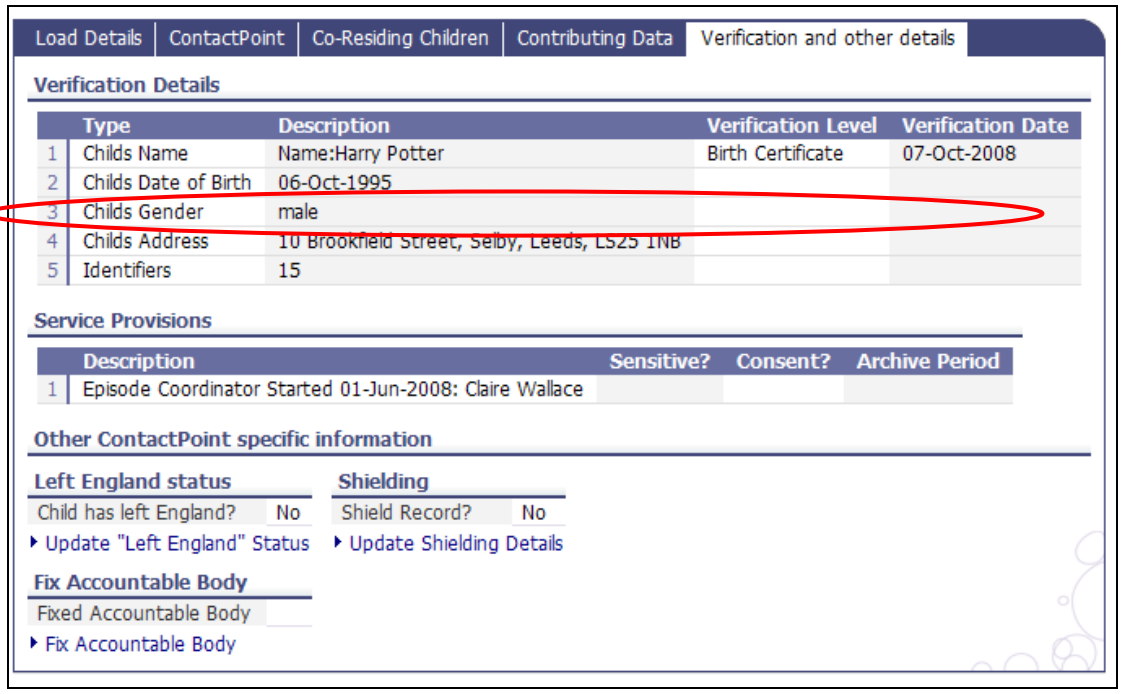
This tab will show all the data that will be sent to ContactPoint from ICS. It will also show a history of any data that has recently changed, such as an address, DOB, Professional Involvements etc.



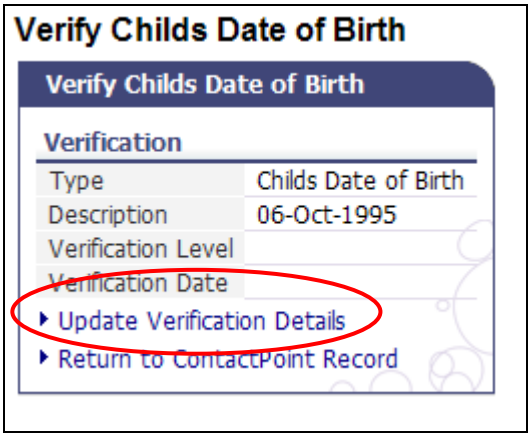
Verification and other Details tab

The verification tab will allow the user to enter backing information to substantiate the accuracy of that data. For instance you a date of birth can be entered into the system and verified in ContactPoint, for example if the user has seen the child's passport.

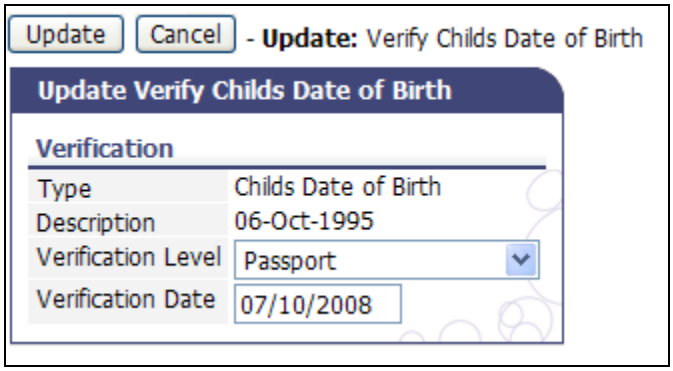
1. Click on the **Verification and other details** tab
2. Click on the line showing the child's **DOB**



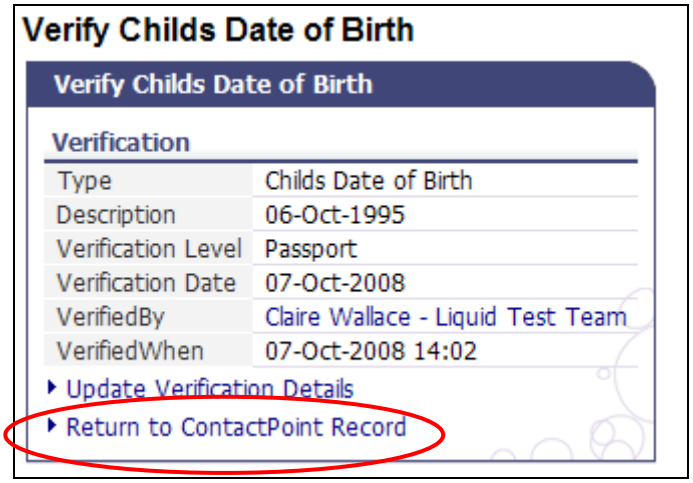
3. Click on the link marked **Update Verification Details**



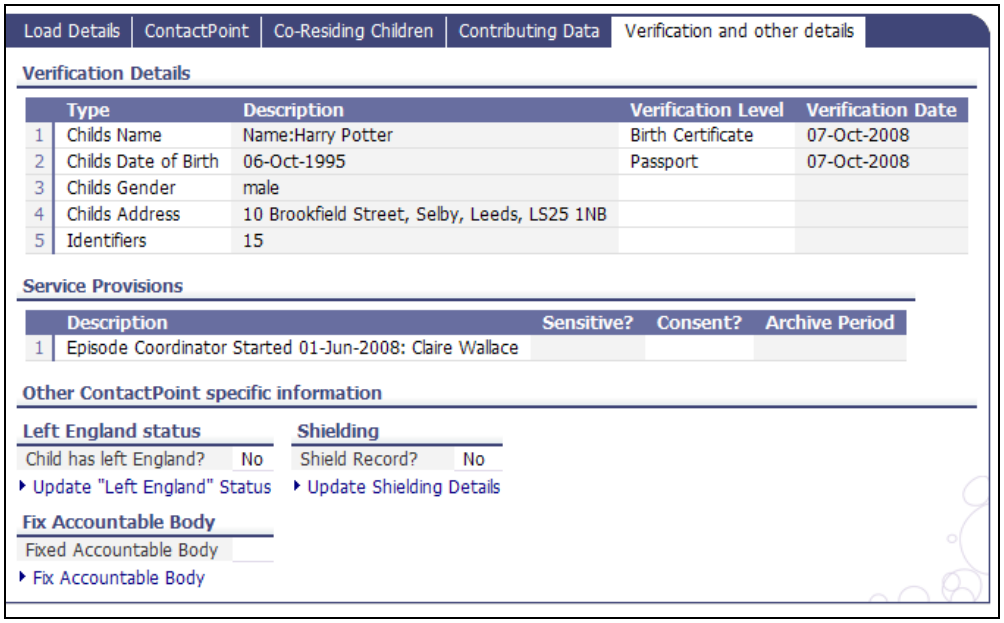
4. Enter the **verification level** (How you have verified the information) and **date**
5. Click **Update**



Once updated the user will be taken to a summary screen where they can either update the record or return to ContactPoint Record by clicking on the **Return to ContactPoint Record** link



The will return the user to the original screen but will see that the verification information has been added.



The next time information is sent to ContactPoint, this verification information will be sent to back up the changes made in the system.

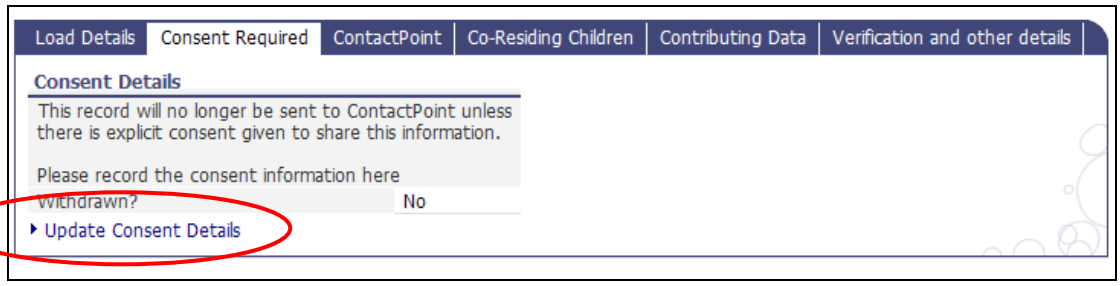
This can also be used to verify any data previously entered into the system, but has come back showing a discrepancy.

Over 18 consent

For any young person over 18 and under 25, still receiving services, i.e. still has an open referral, the user will have the ability to enter Consent details before any changes will be sent to ContactPoint.

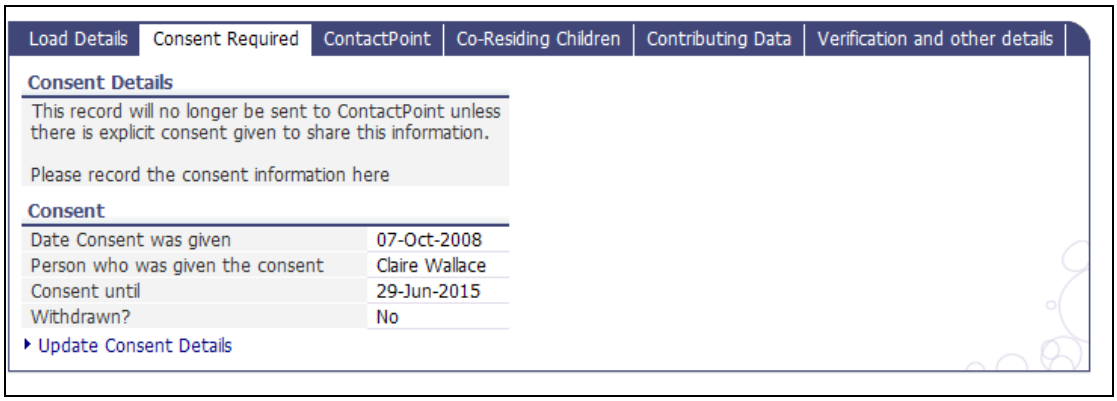
When the child reaches 18 you will see a new tab in ContactPoint marked "**Consent Required**"

1. From ContactPoint, select the **Consent Required** tab
2. Click on the link marked **Update Consent Details**



3. Enter the **Date** consent was given and to **whom**
4. Click **Update**

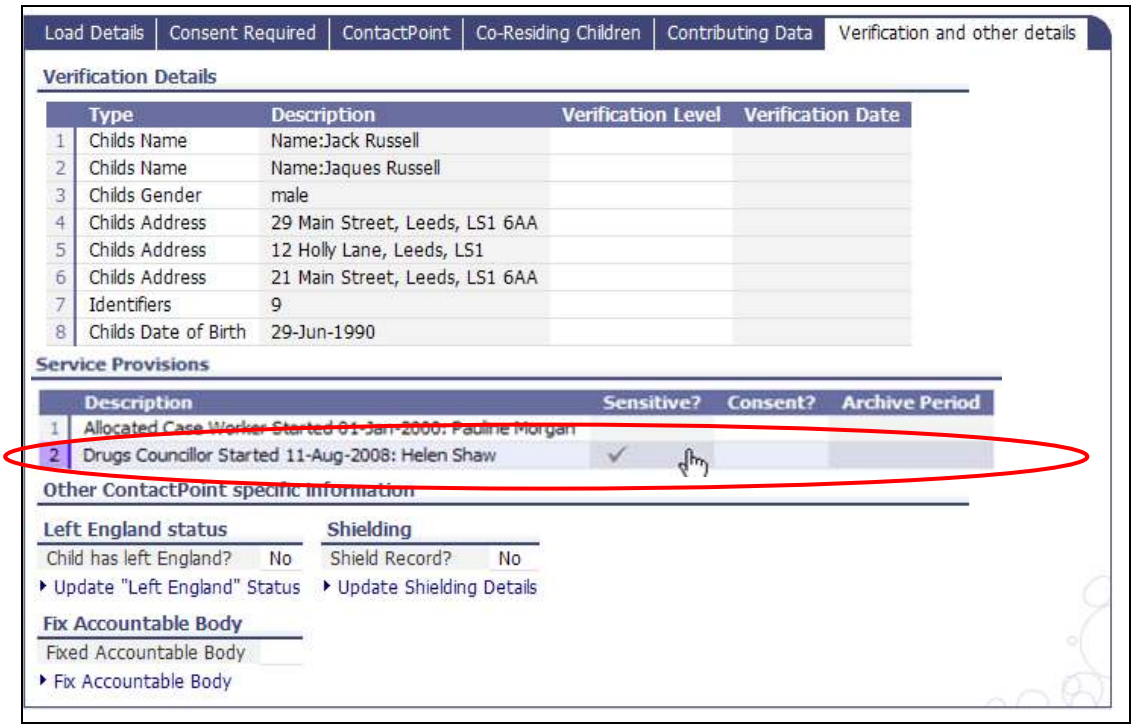
The user will be navigated to the **Consent Required** tab and will be able to see the updated details. These details will now be sent back to ContactPoint.



Sensitive Services

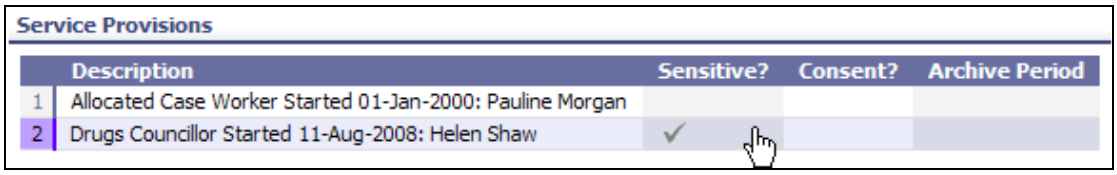
Adding Consent to Sensitive Services

Should a young person have a Service Provision which is of a sensitive nature (e.g. Services with a Drug Councillor), this would be indicated on the Service Provisions area as shown below.

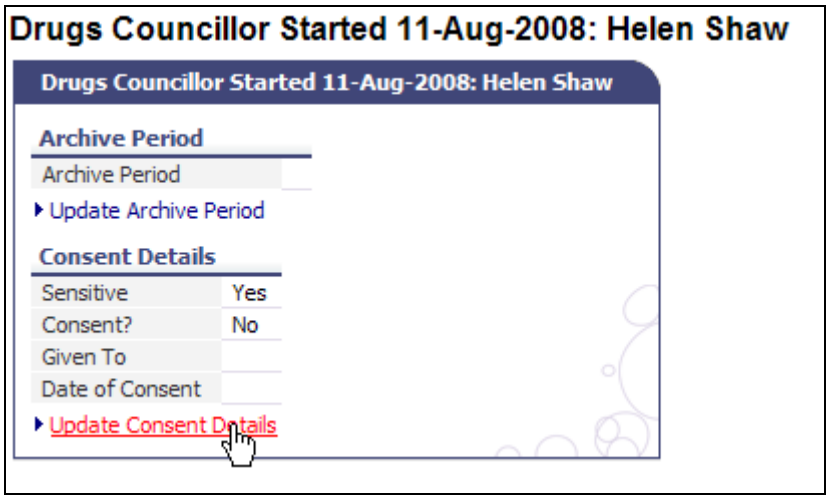


Consent would have to be given by the young person before this information can be added to ContactPoint.

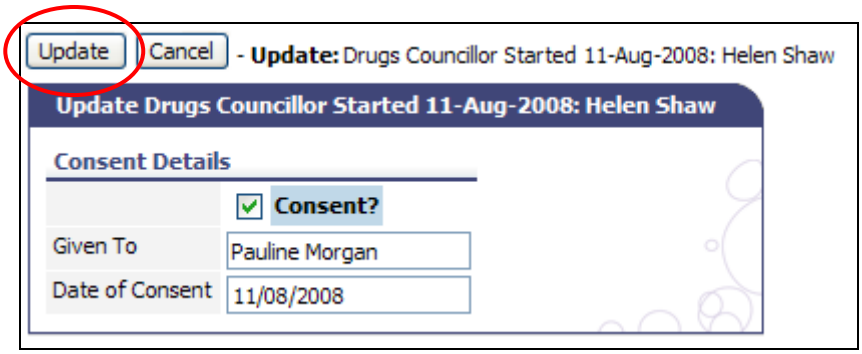
1. Click on the Service Provision where the Drugs Councillor is indicated:



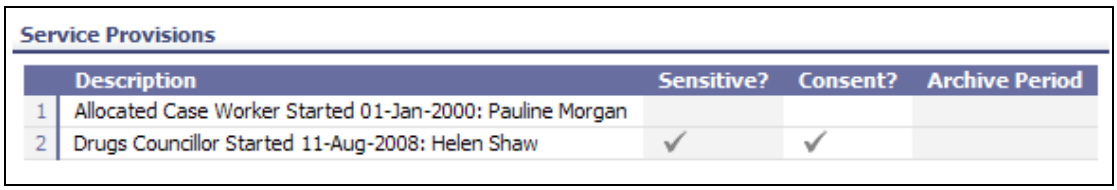
2. Click on **Update Consent Details**



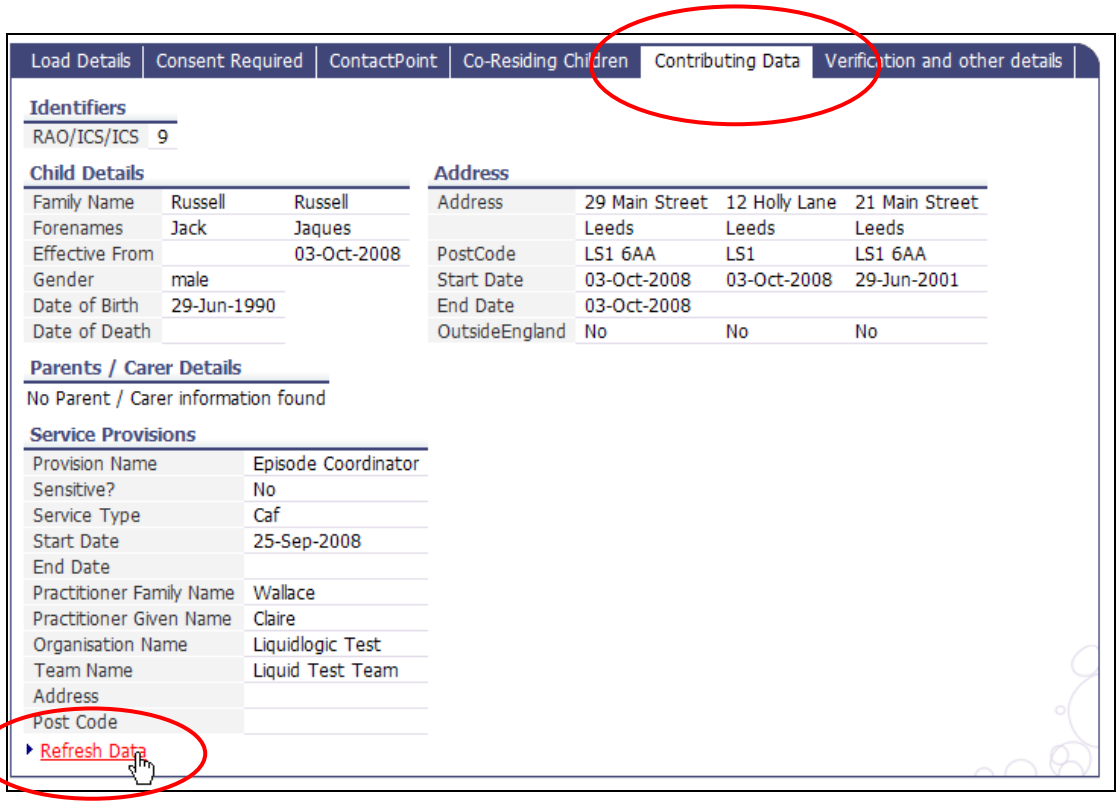
3. Select the Consent checkbox and enter details of the person who was given consent and the date consent was given, then click on **Update**



Details of the consent will then be updated. Click on the internet explorer back button to return to the main screen.



4 Click on the **Contributing Data** tab and **Refresh Data** for the details to be updated and sent to ContactPoint.

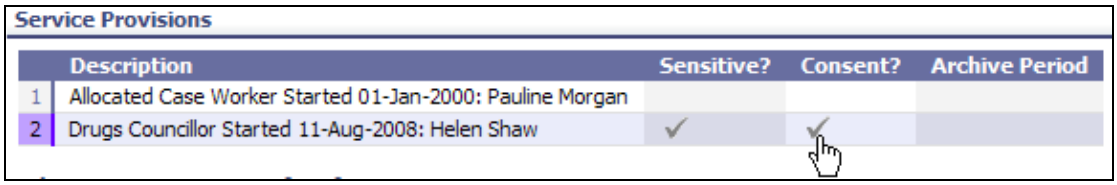


The service will then be added to the contributing data. Access permissions to sensitive services on ContactPoint will be set and configured by ContactPoint

Removing Consent from Sensitive Services

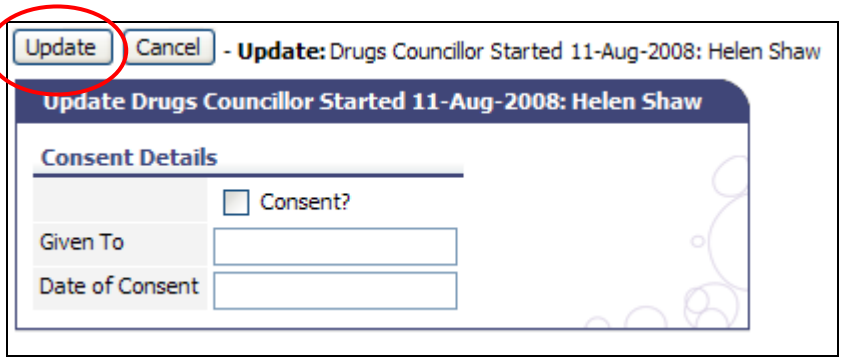
Should a young person who has a Service Provision which is of a sensitive nature (e.g. Services with a Drug Councillor), withdraw consent the Consent needs to be taken off the ContactPoint data information

1. Click on the Service Provision where the Drugs Councillor is indicated:

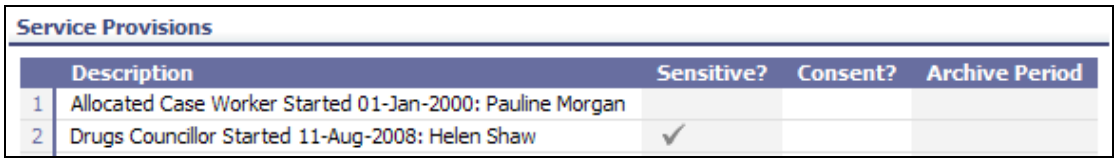


2. Click on **Update Consent Details**

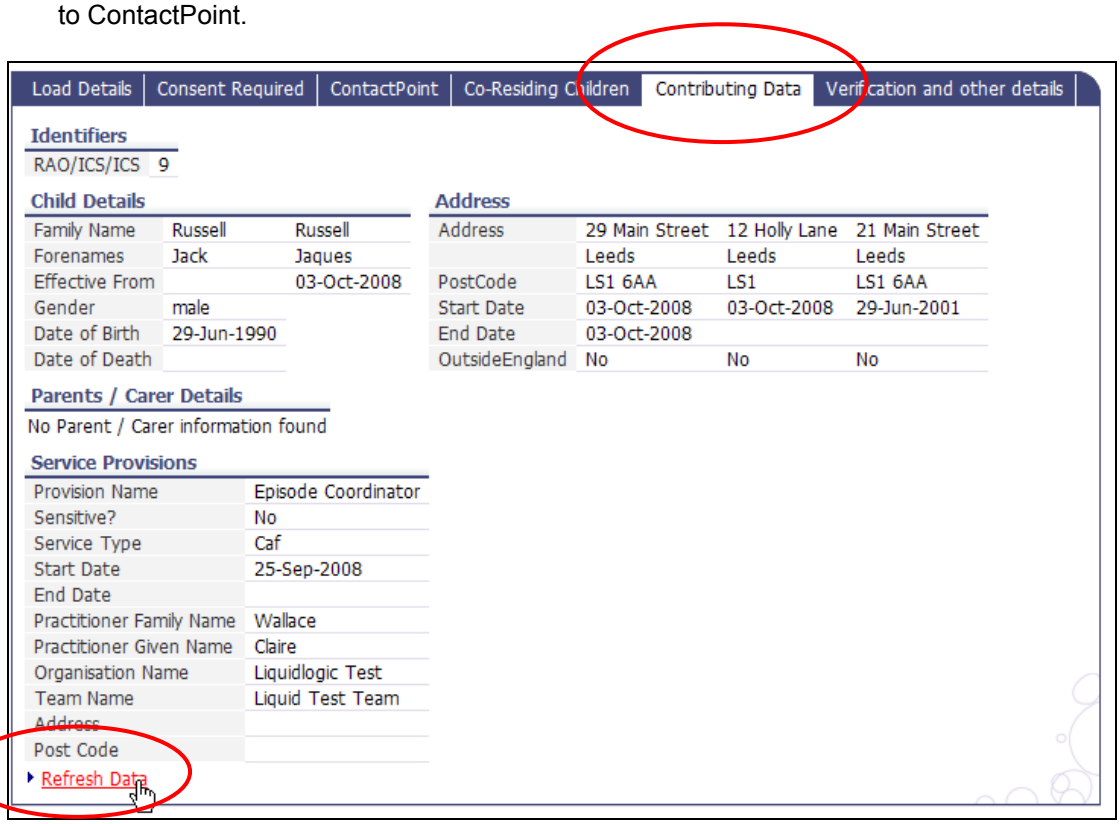
3. Remove the tick from the **Consent?** checkbox and remove the person who was given consent and the date consent was given, then click on **Update**



Details of the consent will then be updated. Click on the internet explorer back button to return to the main screen.



4 Click on the **Contributing Data** tab and **Refresh Data** for the details to be updated and sent to ContactPoint.

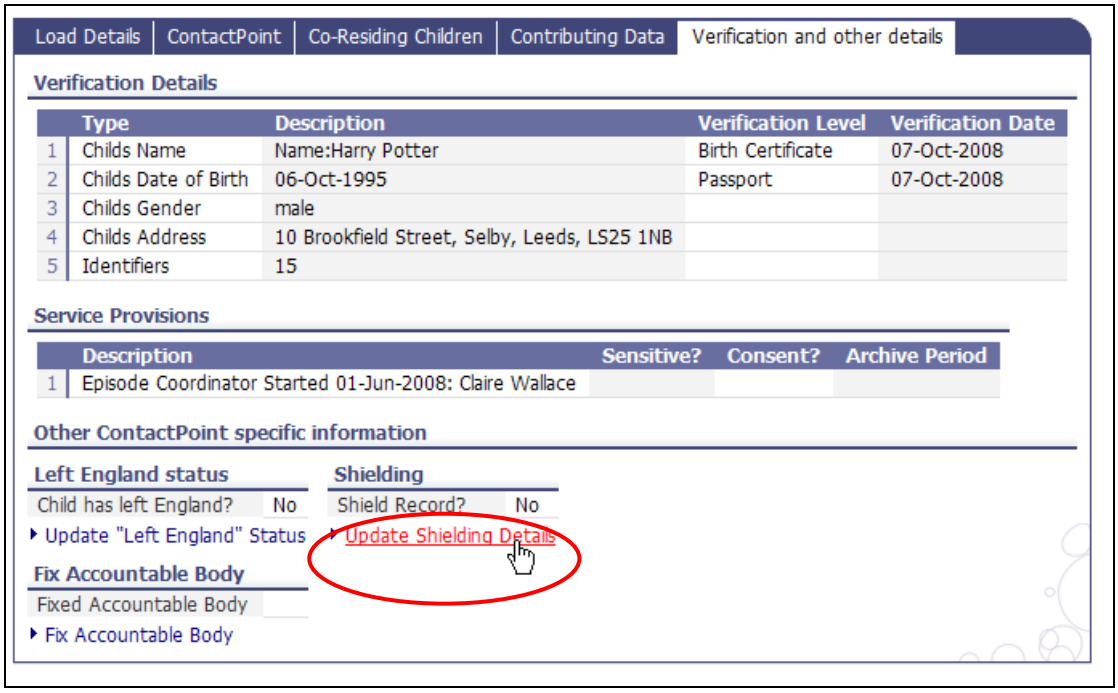


The service will then be removed from the contributing data.

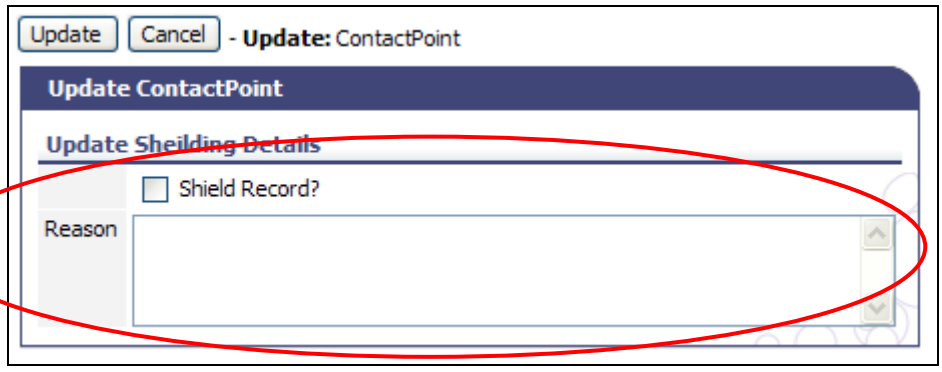
Shielding a Record

A record can be shielded within ContactPoint this should prevent details which are held in your local ICS/Ecaf system from being visable in ContactPoint.

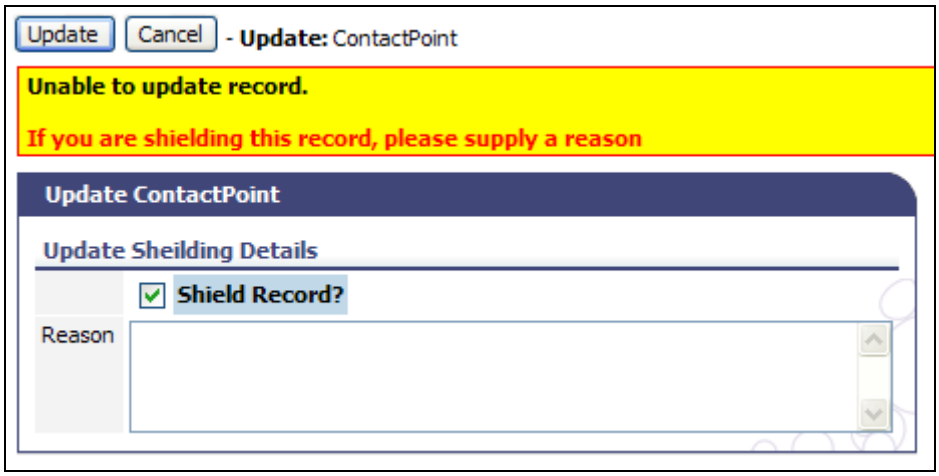
1. To Shield a record click on **Update Shielding Details** from within the **Verification and other details** tab



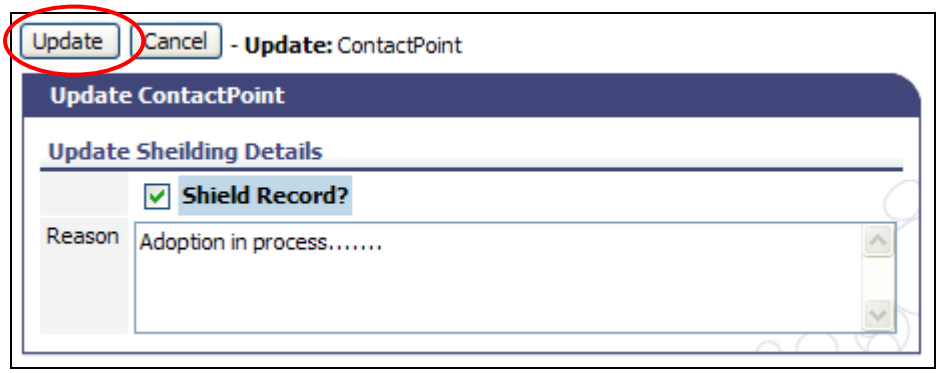
2. Select the **Shield Record?** checkbox and give a reason why the shielding is in place



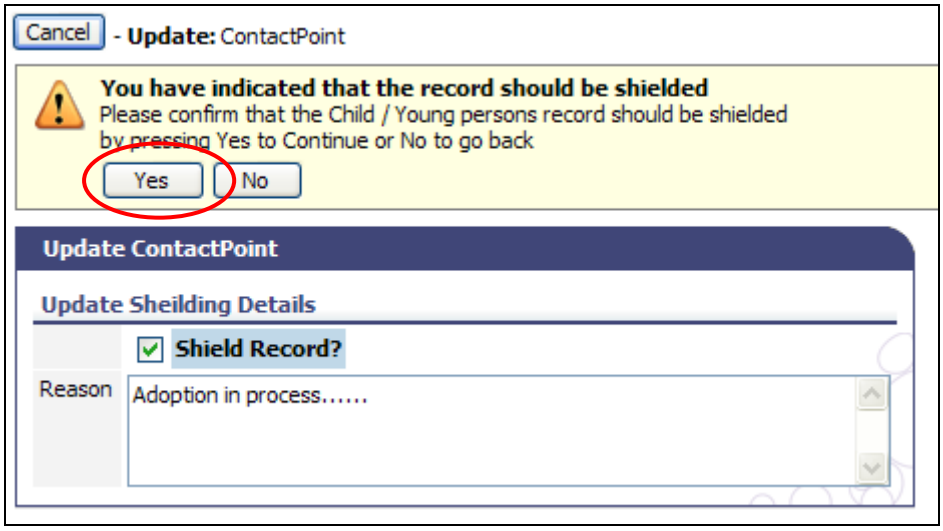
If a reason is not entered an alert will appear requesting that a reason needs to be entered before you can update the record as shown below



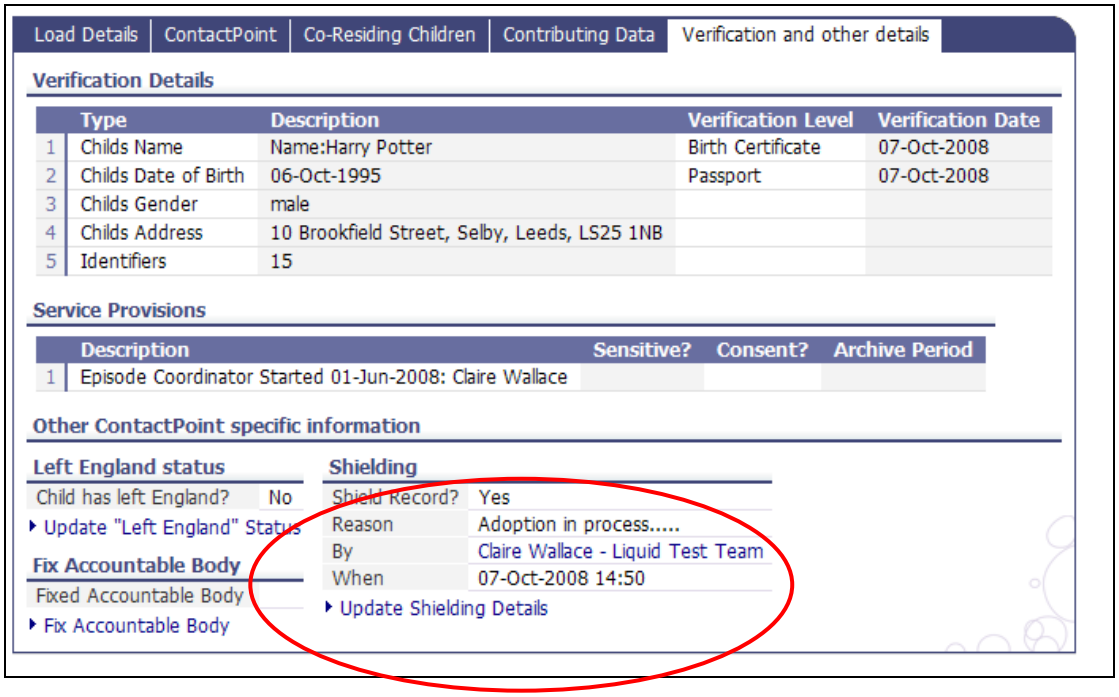
3. Click on **Update**



4. The user will be asked to confirm the record is to be shielded, click on **Yes**


Cancel
- Update: ContactPoint
You have indicated that the record should be shielded
Please confirm that the Child / Young persons record should be shielded by pressing Yes to Continue or No to go back
Yes
No
Update ContactPoint
Update Sheilding Details
Shield Record?
Reason
Adoption in process.....

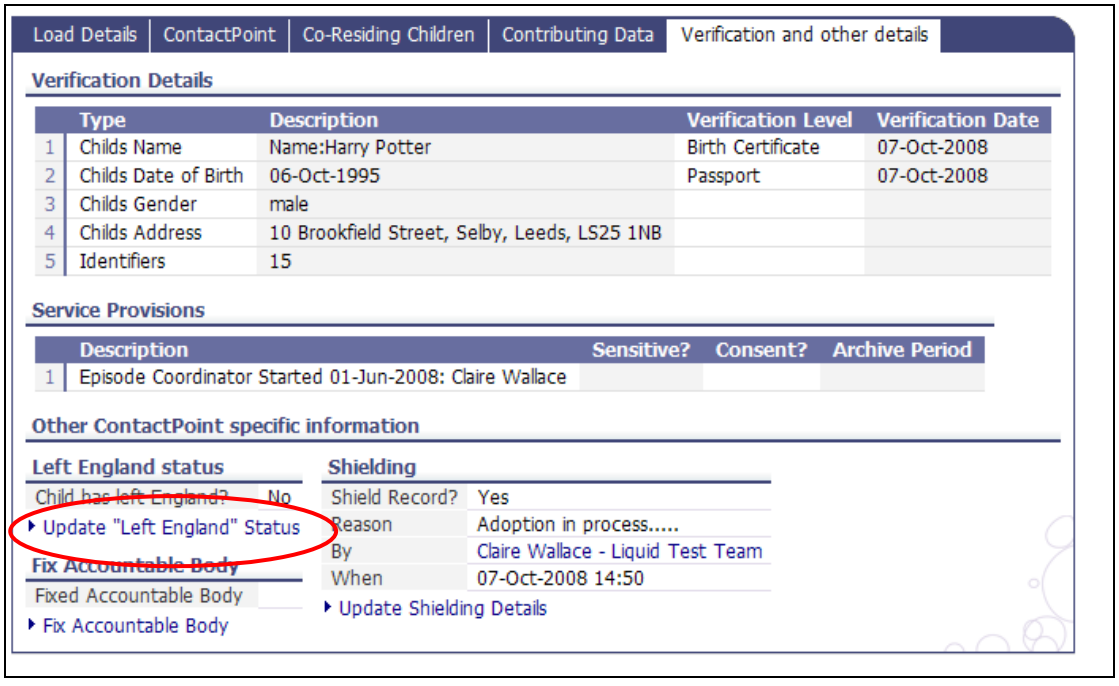
The record will be updated and the details displayed on the **Verification and other details** tab as shown below



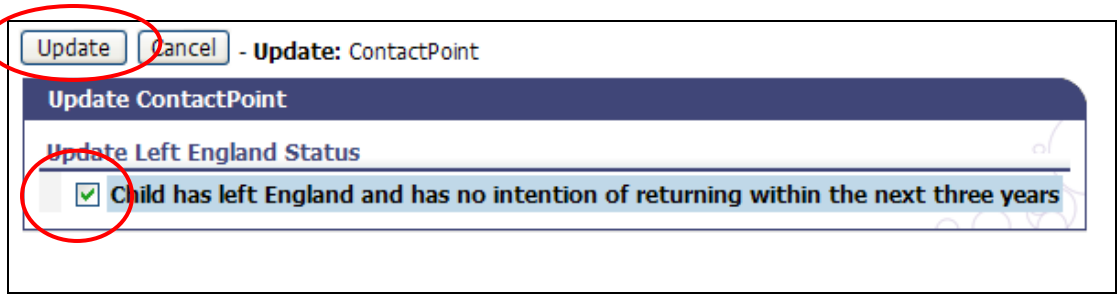
5. Click on the **Contributing Data** tab and **Refresh Data** for the details to be updated and sent to ContactPoint

Left England Status

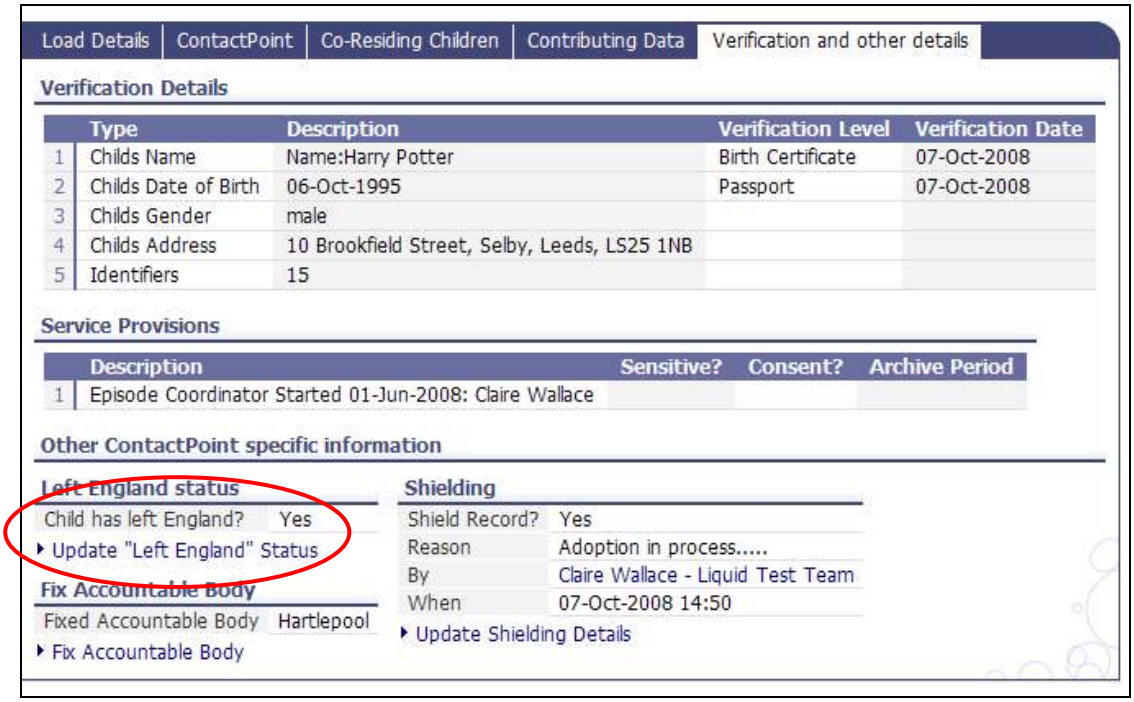
If for any reason the Child has left England and will not be returning for at least 3 years, this can be recorded by clicking on the **Update "Left England"** Status



1. Click on **Update "Left England" Status**
2. Click in box and confirm that the child will not be returning to the UK for the next three years
3. Click **Update**

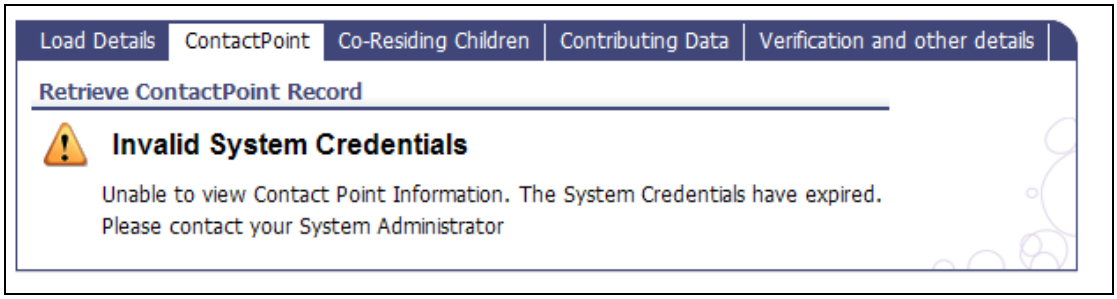

Update
Cancel
- Update: ContactPoint
Update ContactPoint
Update Left England Status
Child has left England and has no intention of returning within the next three years

The details are then recorded in the **Verification and other details** tab. This can be updated by clicking on the link and removing the tick from the box and clicking on update.



Alerts

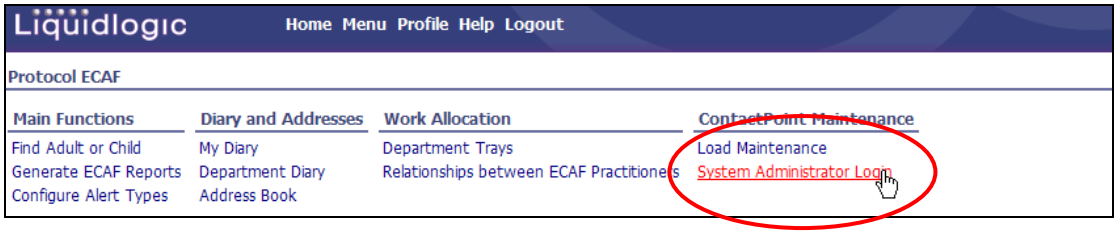
The following alert will appear if access to ContactPoint has expired. Please contact your system administrator.



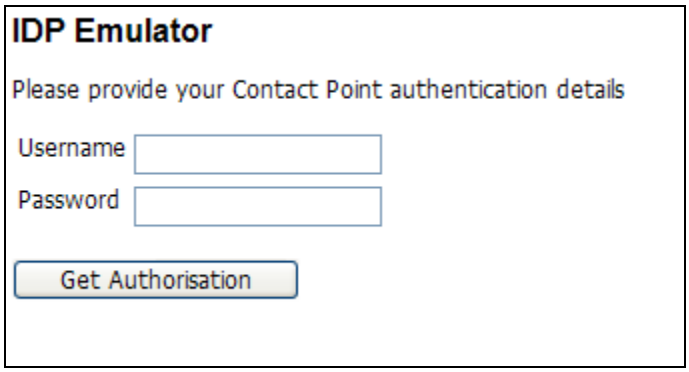
***System Administration Login** (Available to System Administrators only)*

The System Administration Login needs to be set up to allow access to the ContactPoint Database.

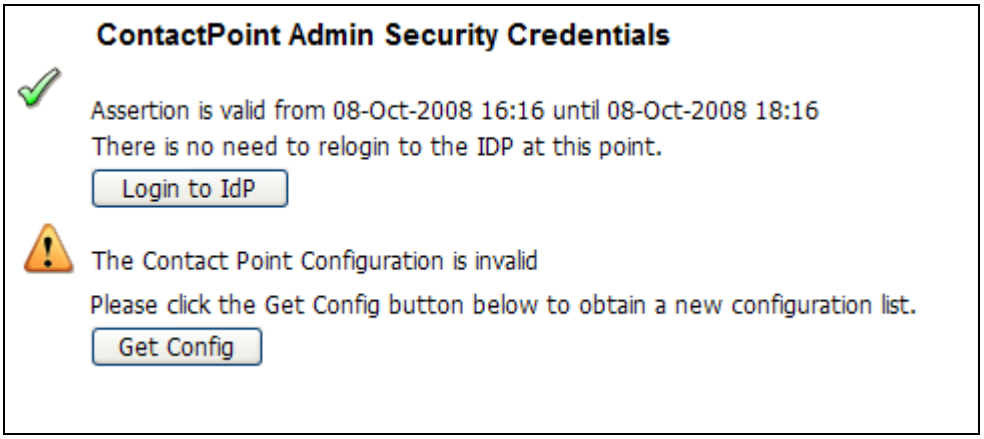
1. Click on **System Administrator Login** from Menu



2. Enter **Username** and **Password**
3. Click on **Get Authorisation**



Access to the **ContactPoint Admin Security Credentials** has now been accessed. This will give a valid from date and time and also when the Credentials will expire, as shown below:


ContactPoint Admin Security Credentials
Assertion is valid from 08-Oct-2008 16:16 until 08-Oct-2008 18:16
There is no need to relogin to the IDP at this point.
Login to IdP
The Contact Point Configuration is invalid
Please click the Get Config button below to obtain a new configuration list.
Get Config